



STAFF REPORT

DATE: January 16, 2024
CONSENT

TO: City Council

FROM: John Taylor, Building Official

AGENDA ITEM: Purchase of ClearGov Permitting Software for the Building, Planning and Fire Departments

REVIEWED BY: Clark Schroder, Interim City Administrator, Dustin Kalis, Fire Chief and Sophia Jensen, City Planner

BACKGROUND:

The Building Department is requesting the council to approve the motion for the purchase of ClearGov Web based Permitting Software for the Building Department. This was budgeted for 2024. The Assessment of the Building and Planning Departments by Ratelis presented in October of 21 under recommendations 10 & 11 asked the departments to investigate using standardized data input templates and implement technology to better support field operations. Currently the software being used is PermitWorks, and the use of this is limited and requires the field person to write down inspection data and transfer to the file when in the office and this is time consuming.

The department tried to contact PermitWorks for information and the module cost to use in the field and there was no response. Metro IT was contacted and will help with the transfer to a new software.

The department then started researching web based permitting software and requested pricing from software vendors for the installation, training and continued maintenance cost of their product.

The Building, Planning and Fire Department then met by Zoom with 4 vendors and then made a selection based on their presentations on what would best help all 3 departments.

ISSUE BEFORE COUNCIL:

Should the City Council approve the software purchase of ClearGov, as recommended by the staff, and as outlined in the 2024 Budget?

PROPOSAL DETAILS/ANALYSIS:

The City of Lake Elmo Building, Planning and Fire Departments will use the new software to better help the community with more access to submitting and tracking their application, inspections and any notices for more info, corrections and final acceptance of the project. Inspectors will be completing their inspections and documenting in real time while in the field. They will be able to email correction notices and upload pictures of the failures to the building file. The purchase price is \$14,700 and the Service Order is provided.

FISCAL IMPACT:

\$20,000 has been budgeted for this in the 2024 Fiscal Budget

OPTIONS:

- Approve the purchase of ClearGov Permitting Software signing of the service contract.
- Do not approve the purchase.

RECOMMENDATION:

If removed from the consent agenda:

“Motion to approve the purchase of ClearGov Permitting Software and Service Contract for \$14,700.00.”

ATTACHMENTS:

- A. ClearGov Service contract.
- B. PDF of Vendors and pricing and additional information.

Technology for better Field reporting and Submittal processing

1. Currently the City of Lake Elmo uses PermitWorks for building permitting and some planning/zoning permits. The Assessment of the Building & Planning Departments by Raftelis presented in October of 2021 had recommendations 10 and 11. These recommendations asked that the city look into standardized data input templates for the PermitWorks system and Implement technology to better support field operations.
2. Issues in the submitting process is the use of paper applications and the applicant not providing all the necessary information up front and then the process of going from one departments Excel file to another department file.
3. A lot of the issues in the field is what information gets lost from the inspection when it is finally inputted into Permit Works when the inspector gets back to the office or how it can be viewed in the field.
4. Raftelis recommend that the city purchase the Remote Inspector Module from PermitWorks to help it the field. The recommendation noted that the city would incur cost with this or any other purchase of an Electronic Records Management system (ERMs).

The Building Inspections Department is looking at replacing the current Permit Software with a more efficient web based software. The department has looked at several options, pricing and is wanting to assist with streamlining the whole permit process for the customer and staff from the application, internal movement between departments, plan review process, payment, scheduling, inspections to the completion of the project. The software can be used by many departments, Fire, Finance, Planning, Code Enforcement and others, not only in the office but in the field. It doesn't require a license for each device and can help with getting the field information, photos, correction letters and other information quicker into the project file and not lost between the project site and the office and also notify the applicant with emails of correction notices or just how the project is progressing and they can see what they are missing. The customer would be able to enter all required information and follow their submittal from input to final approval and even how inspections are going. The applicant would only be allowed to enter a portal that lets them see their project only.

The Organizational Assessment of the Building and Planning Departments listed some recommendations to the departments as a whole and individually. The use of credit cards per Recommendation 8 has risen and is in place but for customers to use this option when paying building permits it is a long process that requires data input on the department side and once completed the customer is direct by email or phone to access the payment portal on the city's website. With the new software the applicant can pay any required upfront fees and when an email is sent by the software upon completion of the plan review process they can finish the payment process. The use of standardized input data templates per Recommendation 10 for Permit Works has been changed on some templates (with help from a new Finance Director with some knowledge of PermitWorks) and more standardized but the data can only be entered by a city employee at their desk. This includes the information that is needed to commence a permit or complaint. Field inspections notes are placed on correction notices at the inspection and are hard to read or they disappear. The inspector then must put the notes in PermitWorks when they get back to office costing more time.

The scheduling of inspections will still be done by office personal but the applicant can request dates and times. This will allow the inspectors to do a few more inspections per day and allow correct

reporting and documentation of issues, correction notices and completion of the inspection. Inspectors will be required to sign in when they are at the inspection and then sign off when done to correctly update the file and notify the applicant for further inspections needed.

The Building Department tried to contact PermitWorks for information on the Modules that Building or Planning would need and their cost. As of this date PermitWorks has not responded to this request or a timeline of a notice to discontinue their product that they will need. City Clerk Julie Johnson has been copied on the emails. Multiple attempts have been made to contact PermitWorks over the year on different subjects and still no response. The Building Department contacted the MI help desk (Aaron Seely) on this and they informed us that they were also having issues contacting PermitWorks on the behalf of other cities with their problems and those entities that were moving away from PermitWorks. They reported that PermitWorks no longer had a phone contact. He also gave names of some other vendors to contact but the initial look into the cost of these was above the budgeted amount.

We are planning four meetings with vendors who submitted pricing and we will then see how Fire, Planning and Building would/could use the product and then see how other departments could use this technology in future.

Once we view all proposals and a consensus is made on what software to pursue the building department will prepare a staff report for January council meeting to purchase.

This is just a step towards better communication between departments and applicants.

John Taylor

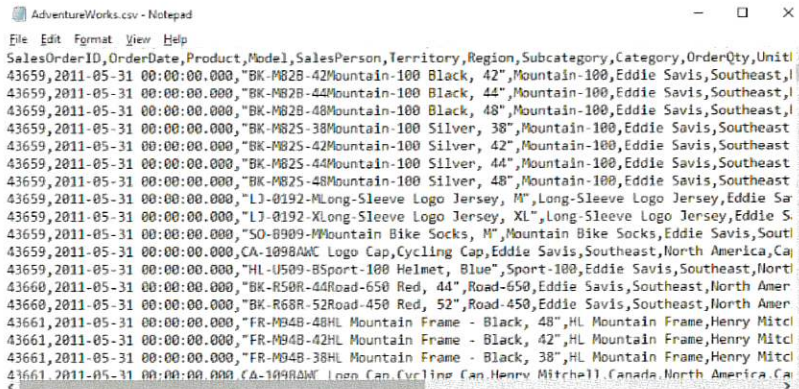
From: MI Helpdesk
Sent: Friday, October 20, 2023 11:26 AM
To: John Taylor
Cc: Julie Johnson
Subject: RE: Permit Works cancelation. [Request ID :##170007##]

Hi John,

Here is a recap of what we talked about today.

- The PermitWorks data resides on a Microsoft SQL database on your in-house server. We can easily make a backup of the entire SQL database and provide it to your new software vendor. Ideally, they would extract all your data and convert it to whatever database format they use and you would have all your data from PermitWorks in your new software.

You mentioned that one vendor said that they could import data if you provide them with a CSV (comma separated value) file. Here is an example of what a CSV looks like when opened in Notepad (Excel all can open CSV files). Note that the first row are the field names and each row after that represents an individual records with values for each field separated by a comma in the same order of the field names in the first row.



```
AdventureWorks.csv - Notepad
File Edit Format View Help
SalesOrderID,OrderDate,Product,Model,SalesPerson,Territory,Region,Subcategory,Category,OrderQty,Unit
43659,2011-05-31 00:00:00.000,"BK-M82B-42Mountain-100 Black, 42",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82B-44Mountain-100 Black, 44",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82B-48Mountain-100 Black, 48",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82S-38Mountain-100 Silver, 38",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82S-42Mountain-100 Silver, 42",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82S-44Mountain-100 Silver, 44",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"BK-M82S-48Mountain-100 Silver, 48",Mountain-100,Eddie Savis,Southeast,1
43659,2011-05-31 00:00:00.000,"LJ-0192-MLong-Sleeve Logo Jersey, M",Long-Sleeve Logo Jersey,Eddie Sa
43659,2011-05-31 00:00:00.000,"LJ-0192-XLong-Sleeve Logo Jersey, XL",Long-Sleeve Logo Jersey,Eddie S.
43659,2011-05-31 00:00:00.000,"SO-8909-MMountain Bike Socks, M",Mountain Bike Socks,Eddie Savis,Sout
43659,2011-05-31 00:00:00.000,"CA-1098AWC Logo Cap,Cycling Cap,Eddie Savis,Southeast,North America,Ca
43659,2011-05-31 00:00:00.000,"HL-R509-RSport-100 Helmet, Blue",Sport-100,Eddie Savis,Southeast,Nort
43660,2011-05-31 00:00:00.000,"BK-R50R-44Road-650 Red, 44",Road-650,Eddie Savis,Southeast,North Amer
43660,2011-05-31 00:00:00.000,"BK-R60R-52Road-450 Red, 52",Road-450,Eddie Savis,Southeast,North Amer
43661,2011-05-31 00:00:00.000,"FR-M94B-48HL Mountain Frame - Black, 48",HL Mountain Frame,Henry Mitc
43661,2011-05-31 00:00:00.000,"FR-M94B-42HL Mountain Frame - Black, 42",HL Mountain Frame,Henry Mitc
43661,2011-05-31 00:00:00.000,"FR-M94B-38HL Mountain Frame - Black, 38",HL Mountain Frame,Henry Mitc
43661,2011-05-31 00:00:00.000,"CA-1098AWC Logo Cap,Cycling Cap,Henry Mitchell,Canada,North America,Ca
```

While that could be done in theory, that put the onus on you to get the data out of PermitWorks into a CSV file in the format or order that the new vendor wants. Also, this is beyond the scope of what we do. Maybe you can run reports in PermitWorks that could be exported to Excel and/or CSV. We could set up a read-only connection to the PermitWorks SQL database called an ODBC connection that could be used by Microsoft Access or Excel so that you could create a custom report, but that takes no-how and time.

The reason software vendors offer the CSV file import option is that it frees them from having to try to understand the database architecture of every software that a new customer might bring to them and save them quite a bit of time and probably could offer you a total price that is cheaper. In the end, if the new software vendor can convert or import the data for you, that is the way to go, even if it costs you more up front.

- One software company that I know of that can import the PermitWorks software into their software is BS&A (<https://www.bsasoftware.com/>). In the last year, they did that for Mounds View and St. Francis and are in the process of doing that for White Bear Township and Gem Lake. They do have a cloud solution now and can host everything in the cloud for you. I can't speak to how well the software works, but could put you in touch with someone at MV and STF so that you can ask them how well it works.

I can also mention that Forests Lake uses BS&A for all their accounting as well as Permitting. They run an in house server since when they switched to BS&A a few years ago since BS&A did not have their cloud offering ready at that point. BS&A does host public facing website for at least Utility Billing (and maybe other modules, I am not sure). We have set up rules on our internet-facing firewall to allow traffic from this website to Forest Lake's in house server so that the public can see live data and any changes they make are seen by city staff on the inside of the network. Here is the link:

<https://bsaonline.com/OnlinePayment/OnlinePaymentSearch/?PaymentApplicationType=10&uid=2789>

- Roseville has also started migrating their accounting to BS&A. They will not be migrating permits or inspections to that since they switch to Accela (<https://www.accela.com/>) from PermitWorks about 10 years ago. Everything Accela has is in the cloud and since they switched, they have hardly ever had to ask us for anything, which must be a good sign. From what I remember it was spendy, but were able to fund part or all of it by adding a \$2-3 surcharge to all transactions done by the public. None of the other cities we work with (which are all smaller than Roseville) use Accela and my impression is that it is going up the food chain a bit. If you are interested, I could find a contact for you to talk to about it.
- Since you use Springbrook for your accounting, you could also look at their permitting module. Since you are using the Springbrook cloud, I can only assume they have a public facing website. Again, I can't speak to how good that might be, but if it is just as good and cost the same, it deserves consideration since journal entries for all transactions in permits will post to the general ledger automatically and there is no need for you or finance to do any sort of manual export/import between the two softwares.
- If you stop paying PermitWorks for support at year end, I don't anticipate it being much of an issue for us to keep PermitWorks running while you find and implement a new solution since we can barely get a hold of them now anyway. But you defiantly what to get to a point where you can shut PermitWorks down.

Let me know if you have any questions.

Aaron Seeley
Senior Server Application Engineer
Metro-INET
651-792-7093

----- John Taylor : JTaylor@lakeelmo.org On Oct 18, 2023 12:44:25 -0500 -----

Riley,

The city of Lake Elmo is looking for new permitting software for 2024 and is looking at the pricing and features to be more web based. Does Permit Works have such a product? What is the cancelation procedure for Permit Works? The City of Lake Elmo, MN would like to inform Permit Works that it plans on canceling at the end of January. Please provide a CVS file of all files and data.

Rob what files or data would Metro-Inet need to help with the transfer of files into a new vendor if Permit Woks is canceled? Thanks,

Sincerely,

John Taylor
Building Official
City of Lake Elmo
3880 Laverne Avenue N
Lake Elmo, MN, 55042
Phone: 651-747-3910
jtaylor@lakeelmo.org



To view this request in the helpdesk, click here:

<https://HELPDESK.metro-inet.us:443/WorkOrder.do?woMode=viewWO&woID=170007&PORTALID=1>

If your problem is solved, click here to close the request:

[Close Request](#)

Category : Computer

Description :

Riley,

The city of Lake Elmo is looking for new permitting software for 2024 and is looking at the pricing and features to be more web based. Does Permit Works have such a product? What is the cancelation procedure for Permit Works? The City of Lake Elmo, MN would like to inform Permit Works that it plans on canceling at the end of January. Please provide a CVS file of all files and data.

Rob what files or data would Metro-Inet need to help with the transfer of files into a new vendor if Permit Woks is canceled? Thanks,

Sincerely,

John Taylor
Building Official
City of Lake Elmo
3880 Laverne Avenue N
Lake Elmo, MN, 55042
Phone: 651-747-3910
jtaylor@lakeelmo.org





Request for Final Cost for New Permitting Software

The City of Lake Elmo is looking for the final cost of installing new Permitting Software. Vendors have already submitted cost estimates and the cost need to reflect a January purchase date. The following updated information is needed:

1. Pricing for the new start date. Including the cost for any training, transfer of files, template design and other actions needed to install and use the new software?
2. Is the pricing based on population (Lake Elmo - 13,800, users – 10-15 or by other determinations)?
3. Does the pricing include all the modules or is there separate pricing for Building, Code Enforcement, Planning, Financing, Administration, Licensing and other modules?
4. The city is currently using Permit Works and will need to have all current files moved into new software.
5. What is the online payment system being used by your software and the costs associated with it?
6. The estimated yearly renewal costs. Are the future price increases based on population, software users or other means?
7. If you haven't previously provided contact information from other MN entities around the size of Lake Elmo (roughly 13,800) using your product, please provide.
8. What other types (building software can it work with (Bluebeam, E-codes)?

This information is requested by November 10, 2023 and a final selection will be made by November 17, 2023.

Regards,

John Taylor

Building Official

Lake Elmo, MN, 55042

Phone: 651-747-3910

jtaylor@lakeelmo.org



IWORQ SERVICE AGREEMENT

For iWorQ applications and services

Lake Elmo here after known as ("Customer"), enters into THIS SERVICE AGREEMENT ("Agreement") with iWorQ Systems Inc. ("iWorQ") with its principal place of business 1125 West 400 North, Suite 102, Logan, Utah 84321.

1. SOFTWARE AS A SERVICE (SaaS) TERMS OF ACCESS:

iWorQ grants Customer a non-exclusive, non-transferable limited access to use iWorQ service(s), application(s) on iWorQ's authorized website for the fee(s) and terms listed in Appendix A. This agreement will govern all application(s) and service(s) listed in the Appendix A.

2. CUSTOMER RESPONSIBILITY:

Customer acknowledges that they are receiving only a limited subscription to use the application(s), service(s), and related documentation, if any, and shall obtain no titles, ownership nor any rights in or to the application(s), service(s), and related documentation, all of which title and rights shall remain with iWorQ. Customer shall not permit any user to reproduce, copy, or reverse engineer any of the application(s), service(s) and related documentation.

iWorQ is not responsible for the content entered into iWorQ's database or uploaded as a document or image.

3. TRAINING AND IMPLEMENTATION:

Customer agrees to provide the time, resources, and personnel to implement iWorQ's service(s) and application(s). iWorQ will assign a senior account manager and an account management team to implement service(s) and application(s). Typical implementation will take less than 60 days. iWorQ account managers will call twice per week, provide remote training once per week, and send weekly summary emails to the customer implementation team. iWorQ can provide project management and implementation documents upon request. iWorQ will do ONE import of the Customer's data. This import consists of importing data, sent by the Customer, in an electronic relational database format. Customer must have clear ownership of all forms, letters, inspections, checklists, and data sent to iWorQ.

4. CUSTOMER DATA:

Customer data will be stored on AWS GovCloud. iWorQ will use commercially reasonable efforts to backup, store and manage Customer data. iWorQ does backups twice per week and offsite backups twice per week. The subscription will renew each year on the anniversary date of this Agreement unless terminated (see 7. TERMINATION).

Customer can run reports and export data from iWorQ application(s) at any time.

Customer can pay iWorQ for additional data management service(s), onsite backups, application(s) and other service(s).

Data upload and storage is provided to every Customer. This includes uploading files up to 3MB and 10 GB of managed data storage on AWS GovCloud. Additional upload file sizes and managed data storage sizes can be provided based on the application(s) and service(s) listed in Appendix A.

Customer can upload and store images with personal information like driver's license, and more. This Data can be used by the customer to complete the permitting, licensing, or code enforcement processes. Customer understands that the data must be uploaded and stored in the Sensitive Data Upload section of the iWorQ software for access and security purposes.

iWorQ is not responsible: (1) For the content entered into iWorQ's database, (2) For images or documents scanned locally and uploaded by the iWorQ users, (3) For documents or images uploaded by citizens over the web, and (4) For backup data sent to the Customer by iWorQ.

5. CUSTOMER SUPPORT:

Customer support and training are FREE and available Monday-Friday, from 6:00 A.M. to 5:00 P.M. MST, for any authorized user with a login. iWorQ provides unlimited remote Customer training (through webinars), phone support, help files, and documentation. Basic support request is typically handled the same day. iWorQ provides "Service NOT Software".

6. BILLING:

iWorQ will invoice Customer on an annual basis. iWorQ will send invoice by mail and by email to the address(s) listed in Appendix A. Terms of the invoice are net 30 days. Any billing changes will require that a new Service(s) Agreement be signed by Customer.

Any additional costs imposed by the Customer including business licenses, fees, or taxes will be added to the Customer's invoice yearly. Support and services fees may increase in subsequent years, but will increase no more than 5% per year.

7. TERMINATION:

Either party may terminate this agreement, after the initial 3-YEAR TERM, without cause if the terminating party gives the other party sixty (60) days written notice. Should Customer terminate any application(s) and or service(s) the remaining balance will immediately become due. Should Customer terminate any part of the application(s) and or service(s) a new Service(s) Agreement will need to be signed.

Upon termination (7. TERMINATION), iWorQ will discontinue all application(s) and or service(s) under this Agreement; iWorQ will provide customer with an electronic copy of all of Customer's data, if requested by the Customer (within 3-5 business days).

During the term of the Agreement, the Customer may request a copy of all of Customer's data for a cost of no more than \$2,500; and all provisions of this Agreement will continue.

8. ACCEPTABLE USE:

Customer represents and warrants that the application(s) and service(s) will only be used for lawful purposes, in a manner allowed by law, and in accordance with reasonable operating rules, and policies, terms and procedures. iWorQ may restrict access to users upon misuse of application(s) and service(s).

9. MISCELLANEOUS PROVISIONS:

This Agreement will be governed by and construed in accordance with the laws of the State of Utah.

10. CUSTOMER IMPLEMENTATION INFORMATION:

Primary Implementation Contact _____ Title _____

Office Phone _____ Cell (required) _____

Email _____

Secondary Implementation Contact _____ Title _____

Office Phone _____ Cell (required) _____

Email _____

Portal Setup Contact (required) _____ Title _____

Office Phone _____ Cell _____

Email _____ Signature _____

(This person is responsible for placing the iWorQ Portal Link being placed on the agency's website within 90 days of the agreement signature. The iWorQ Portal Link will remain on agencies website for the entire Term of the agreement. If the iWorQ Portal Link is not placed on the city website within 90 days, the Agency agrees to pay an additional \$1,000 dollars towards setup costs (this is to cover iWorQ's time).

11. CUSTOMER BILLING INFORMATION:

Billing Contact _____ Title _____

Billing Address: _____

Office Phone _____ Cell _____

Email _____

PO# _____ (if required) Tax Exempt ID # _____

12. ACCEPTANCE:

The effective date of this Agreement is listed below. Authorized representative of Customer and iWorQ have read the Agreement and agree and accept all the terms.

Signature _____

Effective Date: _____

Printed Name _____

Title _____

Office Number _____

Cell Number _____

iWorQ Service(s) Agreement
APPENDIX A

iWorQ Price Proposal

Lake Elmo	Population- 13,449
3800 Laverne Avenue North, Lake Elmo, MN 55042	Prepared by: Ben Freeman and Steve Hulse

Annual Subscription Fees

Application(s) and Service(s)	Package Price	Billing
<p>Community Development (Enterprise Package)</p> <p>*Permit Management *Code Enforcement *Portal Home *Online credit/debit card processing integrated with iWorQ. (Through PayRoc)</p> <p>-Configurable portal for ease of applying for permits, tracking current permits, and paying fees online -Allows for submitting code enforcement issues online and viewing code cases -Messaging feature for easy interaction with citizens -Built-in automatic workflow capabilities -iWorQ Notifications included -Inspection and plan review tracking -Track permits and cases with customizable reporting -Includes Premium Data (25MB Uploads, 100GB Total Storage) -Includes Sensitive File Uploads that are required to finish permit, licensing or code enforcement process (i.e Driver's License) -3 Scheduled Reports -Includes 20 standard electronic database driven permit forms and 3 Custom database permit Forms for Portal Home -Free letters, and/or permits utilizing iWorQ' template library and up to 3 custom letters -OpenStreetMap tracking abilities with quarterly updates</p> <p>GIS REST Services - iWorQ will publish your agency's WMS layers in iWorQ Community Development applications. iWorQ will update parcel information monthly from the published service.</p>	<p>\$11,500 \$10,500</p>	Annual

Note: If GIS configurations change (FTP location, name format, field changes, etc.) iWorQ will charge a minimum \$500 fee to accommodate new configuration adjustments (subject to additional hourly charges)		
Additional Web Forms for Online Portal (6) Additional Web forms for Online Permit Applications. (Total Web Forms = 9) Note: Additional Web Forms can be purchased as needed: \$500/annually for 3	\$1,000 \$500	Annual
Subscription Fee Total (This amount will be invoiced each year)	\$12,500 \$11,000	Annual

One-Time Setup, GIS integration, and Data Conversion Fees

Service(s)	Full Price Cost	Package Price	Billing
Implementation and Setup cost year 1	\$8,400	\$8,400 \$7,000	Year One
Up to 5 hours of GIS integration and data conversion	\$1,000	Included	Year One
Data Conversion	\$4,900	Included	Year One
One-Time Setup Total (This amount will be added year 1)	\$14,300	\$8,400 \$7,000	Year One
Grand Total Due Year 1	\$26,800	\$20,900 \$18,000	Year One Total

NOTES AND SERVICE DESCRIPTION

- I. Invoice for the (Annual Subscription Fee Total + One-Time Total) will be sent out 2 weeks after signature and Effective Date
- II. This subscription Fee and Agreement have been provided at the Customer's request and is valid until **January 31st, 2023.**
- III. This cost proposal cannot be disclosed or used to compete with other companies.



Request for Final Cost for New Permitting Software

The City of Lake Elmo is looking for the final cost of installing new Permitting Software. Vendors have already submitted cost estimates and the cost need to reflect a January purchase date. The following updated information is needed:

1. Pricing for the new start date. Including the cost for any training, transfer of files, template design and other actions needed to install and use the new software?
 - Annual Cost starting January: \$7,500
 - Set up cost, Including import of historic data, training, creating permits and forms: one time investment of \$7,200
2. Is the pricing based on population (Lake Elmo - 13,800, users – 10-15 or by other determinations)?
 - Pricing is population based, the annual subscription will allow the City of Lake Elmo to have an unlimited number of forms and users.
3. Does the pricing include all the modules or is there separate pricing for Building, Code Enforcement, Planning, Financing, Administration, Licensing and other modules? 4. The city is currently using Permit Works and will need to have all current files moved into new software.
 - Pricing includes all modules, with our Quickstart initiative we would be able to upload all of the historic data from permit works into ClearForms for you.
5. What is the online payment system being used by your software and the costs associated with it?
 - Our third party payment provider is Stripe, if the City wants to use their own payment provider that is acceptable as well. Currently a 2% transaction fee that is typically passed on to the applicant.
6. The estimated yearly renewal costs. Are the future price increases based on population, software users or other means?
 - There is a 3% annual increase on pricing. No price increase is determined by other factors within the city.

7. If you haven't previously provided contact information from other MN entities around the size of Lake Elmo (roughly 13,800) using your product, please provide.

- We do not have any customers in Minnesota roughly around the 13,800 population but I will provide you with some other customers with a similar population size.

8. What other types (building software can it work with (Bluebeam, E-codes)?)

- ClearForms is compatible with Esri currently and is looking to form a partnership with Bluebeam in the near future.

This information is requested by November 10, 2023 and a final selection will be made by November 17, 2023.

Regards,

John Taylor

Building Official

Lake Elmo, MN, 55042

Phone: 651-747-3910

jtaylor@lakeelmo.org



Request for Final Cost for New Permitting Software 10-17-2023

Pricing for the new start date. Including the cost for any training, transfer of files, template design and other actions needed to install and use the new software?

Attached with email.

2. Is the pricing based on population (Lake Elmo - 13,800, users – 10-15 or by other determinations)?

Pricing is based on Population.

3. Does the pricing include all the modules or is there separate pricing for Building, Code Enforcement, Planning, Financing, Administration, Licensing and other modules?

Pricing will include the modules that John and I have discussed. We do not offer modules for Financing. Also Licensing is a separate module. Please let me know if you would like pricing on licensing?

4. The city is currently using Permit Works and will need to have all current files moved into new software.

That will not be a issue as we will have one of our data conversion specialists work with you on getting that information from Permit Works in to the iWorQ Software. That way you are not losing any of that old data.

5. What is the online payment system being used by your software and the costs associated with it?

PayRoc, is the third party vendor we use for payment processing. They have a 3.5% fee associated with that (e.g. Fee is \$100. The Citizen or contractor would be \$103.50. \$100 would go to the city and \$3.50 would go to PayRoc for the payment processing fee).

6. The estimated yearly renewal costs. Are the future price increases based on population, software users or other means?

Renewal costs will be the same from year to year. In the 20+ years we have been in business we have not raised the pricing on any of the 2,500+ customers that are with us today. Essentially what you sign on at with the annual cost is what you will expect to pay for the years to come.

7. If you haven't previously provided contact information from other MN entities around the size of Lake Elmo (roughly 13,800) using your product, please provide.

I have provide references to John. But just in case here are some listed below. Feel free to reach out at your convenience.

City of Austin- Holly Wallace

Phone: 507-437-9952

Email: hollyw@ci.austin.mn.us (email is best for her)

Shorewood - Marie Darling

Phone: 952-960-7912

Email: mdarling@ci.shorewood.mn.us

Elko New Market - Jacob Skluzacek

Phone: 952-229-6963

Email: jskluzacek@ci.enm.mn.us

Fillmore County - Kristi Ruesink or Cristal Adkins

Kristi's Phone: 507-765-3896

Cristal's Phone: 507-765-3325

Email: kruesink@co.fillmore.mn.us

Email: cadknis@co.fillmore.mn.us

8. What other types (building software can it work with (Bluebeam, E-codes)?

We are integrated with Bluebeam and are able to get all the info for ordinances and violations from E-Code and get them directly transferred in the iWorQ software.

We also area Esri Partner. So if you have a ArcGIS or ArcOnline account through Esri we can tie into that and it would give you monthly updates directly from the county, instead of it being a quarterly update.

John Taylor

From: John Taylor
Sent: Thursday, August 17, 2023 10:41 AM
To: Karissa Goers
Subject: RE: iWorQ

Thank you,

Other people have said the same thing about reports but they said to be sure and have the type of reports you wanted ready and they can blend into.

From: Karissa Goers <KGoers@lakeelmo.org>
Sent: Thursday, August 17, 2023 10:35 AM
To: John Taylor <JTaylor@lakeelmo.org>
Subject: iWorQ

Hello John,

Here are the questions I asked Lauren and the answers we got back.

1. What software did you have before you went to iWorQ and what departments are utilizing it?
2. Can the different departments easily pull their reports from it?
3. How do you like using it?
4. Does the community like using it because it can be accessed online and paid online?

Good Morning!

1. We used permit works prior to lworq. No one uses it anymore.
2. It is used for building permits, rentals, code enforcement, and vacant property in our office. The city clerk uses it for city licenses. We all have access to the reports.
3. It works best for permits. The few complaints I have are the tracking for payments/inspections on vacant and rentals. The reports are vague and not very user friendly.
4. We have not used the app or introduced it to the community yet. Some people use it to apply for our flat rate permits online and we haven't had any complaints there.

Regards,
Karissa

Karissa Goers
Administrative Services Director
MHRM | SPHR | SHRM - SCP
3800 Laverne Ave. N. Lake Elmo, MN 55042
P: (651) 747-3908
kgoers@lakeelmo.org
www.lakeelmo.org

John Taylor

From: Hannah B. Lynch
Sent: Friday, August 4, 2023 8:23 AM
To: John Taylor
Subject: RE: iWorQ Software

Hi John,

Paul is no longer working here, but I'm happy to help with this. I have enjoyed using iWorQ. We use it for permitting and code enforcement, and it syncs together nicely. To get the most out of it, you need to make sure as many fields are filled in as possible and ensuring your entire team is using it. If you do this, you'll be sure to get the full utilization of the software.

I hope that helps. Have a great weekend!

Hannah B. Lynch
Community Development Coordinator / Planner

City of Falcon Heights
2077 West Larpenteur Avenue
Falcon Heights, MN 55113

Direct 651-792-7613

"The City that Soars"
"Families, Fields and Fair"

From: John Taylor <JTaylor@lakeelmo.org>
Sent: Friday, August 4, 2023 8:15 AM
To: Hannah B. Lynch <hannah.b.lynych@falconheights.org>
Subject: iWorQ Software

Good morning Paul,

I'm the Building Official at Lake Elmo, MN and we are looking at new permit software to replace Permit Works. I was given your contact info from the vendor and just wanted to know how it is working for your community and what departments are using it?

You can call me at my cell 651-491-4723 or email me back.

Thank you,

John Taylor
Building Official
City of Lake Elmo
3880 Laverne Avenue N
Lake Elmo, MN, 55042
Phone: 651-747-3910
jtaylor@lakeelmo.org

John Taylor

From: Jacob Skluzacek <jkskluzacek@ci.enm.mn.us>
Sent: Friday, August 4, 2023 8:23 AM
To: John Taylor
Cc: Stephanie Fredrickson; Corey Schweich
Subject: RE: iWorQ Software

Caution: This email originated outside our organization; please use caution.

Hello John,

I have copied Stephanie Fredrickson, our Utility Billing/Office Tech, and Corey Schweich, our Public Works Director. Steph has the most experience using iWorQ for permit management. Corey is the person to talk to with any questions about the work/facility management software offered by iWorQ. I am the primary Staff contact that deals with the code enforcement side of the software. So far, I think the City is satisfied with the software. I know it has helped speed up building permits and has made code enforcement a lot simpler. We were able to use CARES funds for the first few years of subscription cost, but I think it is likely that we renew when the time comes.

Did you have any specific questions about the software we could help you answer?

Thanks,

Jacob Skluzacek, Planner 1



City of Elko New Market
PO Box 99 Elko New Market, MN 55020
Phone: (952) 461-2711 jkskluzacek@ci.enm.mn.us

From: John Taylor <JTaylor@lakeelmo.org>
Sent: Friday, August 4, 2023 8:18 AM
To: Jacob Skluzacek <jkskluzacek@ci.enm.mn.us>
Subject: iWorQ Software

Good morning Jacob,

I'm the Building Official at Lake Elmo, MN and we are looking at new permit software to replace Permit Works. I was given your contact info from the vendor and just wanted to know how it is working for your community and what departments are using it?

You can call me at my cell 651-491-4723 or email me back.

Thank you,

John Taylor
Building Official
City of Lake Elmo
3880 Laverne Avenue N
Lake Elmo, MN, 55042
Phone: 651-747-3910
jtaylor@lakeelmo.org





Request for Final Cost for New Permitting Software

The City of Lake Elmo is looking for the final cost of installing new Permitting Software. Vendors have already submitted cost estimates and the cost need to reflect a January purchase date. The following updated information is needed:

1. Pricing for the new start date. Including the cost for any training, transfer of files, template design and other actions needed to install and use the new software?
 - Annual Cost starting January: \$7,500
 - Set up cost, Including import of historic data, training, creating permits and forms: one time investment of \$7,200
2. Is the pricing based on population (Lake Elmo - 13,800, users – 10-15 or by other determinations)?
 - Pricing is population based, the annual subscription will allow the City of Lake Elmo to have an unlimited number of forms and users.
3. Does the pricing include all the modules or is there separate pricing for Building, Code Enforcement, Planning, Financing, Administration, Licensing and other modules? 4. The city is currently using Permit Works and will need to have all current files moved into new software.
 - Pricing includes all modules, with our Quickstart initiative we would be able to upload all of the historic data from permit works into ClearForms for you.
5. What is the online payment system being used by your software and the costs associated with it?
 - Our third party payment provider is Stripe, if the City wants to use their own payment provider that is acceptable as well. Currently a 2% transaction fee that is typically passed on to the applicant.
6. The estimated yearly renewal costs. Are the future price increases based on population, software users or other means?
 - There is a 3% annual increase on pricing. No price increase is determined by other factors within the city.

7. If you haven't previously provided contact information from other MN entities around the size of Lake Elmo (roughly 13,800) using your product, please provide.

- We do not have any customers in Minnesota roughly around the 13,800 population but I will provide you with some other customers with a similar population size.

8. What other types (building software can it work with (Bluebeam, E-codes)?)

- ClearForms is compatible with Esri currently and is looking to form a partnership with Bluebeam in the near future.

This information is requested by November 10, 2023 and a final selection will be made by November 17, 2023.

Regards,

John Taylor

Building Official

Lake Elmo, MN, 55042

Phone: 651-747-3910

jtaylor@lakeelmo.org





Service Order

2 Mill & Main; Suite 630; Maynard, MA 01754

Created by	Kian Ghelichkhani
Contact Phone	408-466-4926
Contact Email	Kghelichkhani@cleargov.com

Order Date	Jul 24, 2023
Order valid if signed by	Aug 31, 2023

Customer Information			
Customer	Lake Elmo, MN	Contact	John Taylor
Address	3800 Laverne Ave N	Title	Building Official
City, St, Zip	Lake Elmo, MN 55042	Email	Jtaylor@lakeelmo.org
Phone	651-747-3900	Billing Contact	
		Title	
		Email	
		PO # (If any)	

The Services you will receive and the Fees for those Services are...		
Set up Services	Tier/Rate	Service Fees
ClearForms Quickstart: Includes single workflow development and historical data upload.	Tier E	\$ 4,320.00
ClearGov Setup: Includes activation, onboarding and training for ClearGov solutions.	Tier E	\$ 2,880.00
Total ClearGov Setup Service Fee - Billed ONE-TIME		\$ 7,200.00
Subscription Services	Tier	Service Fees
ClearGov ClearForms - Department Edition - Building Department	Tier E	\$ 7,500.00
Total ClearGov Subscription Service Fee - Billed ANNUALLY IN ADVANCE		\$ 7,500.00
Special Terms	Applies to	Amount

ClearGov will provide your Subscription Services according to this schedule...			
Period	Start Date	End Date	Description
Setup	Sep 1, 2023	Sep 1, 2023	ClearGov Setup Services
Initial	Mar 1, 2024	Feb 28, 2027	ClearGov Subscription Services

To be clear, you will be billed for your Services as follows...		
Billing Date(s)	Amount(s)	Notes
Sep 1, 2023	\$7,200.00	One Time Setup Fee
Sep 1, 2023	\$7,500.00	Annual Subscription Fee

Additional subscription years and/or renewals will be billed annually in accordance with pricing and terms set forth herein.

To be clear, this is how Transaction and Processing Fees will be billed...					
Transaction Fees					
Transaction Fee	2.0% of Transaction Amount	Paid by	End User	Billing Cycle	At Transaction
Transaction Fee Terms	The Transaction Fee will be charged for each Transaction processed via the ClearGov Service. If Transaction Fees are to be paid by the End User, the Transaction Fee will be charged at the time of the Transaction. If Transaction Fees are to be paid by Customer, then Transaction Fees will be deducted from the Transaction Amount at the time of the Transaction or invoiced monthly in arrears as indicated herein.				
Processing Fees					
Processing Fee	Determined by Payment Provider	Paid by	End User	Payment Provider	<<Third Party>>
Processing Fee Terms	The Processing Fee will be charged for each Transaction processed via the ClearGov Service. If Processing Fees are to be paid by the End User, the Processing Fee will be charged at the time of the Transaction. If Processing Fees are to be paid by Customer, then Processing Fees will be deducted from the Transaction Amount at the time of the Transaction. Processing Fees shall be charged/deducted directly by the Payment Provider.				

Billing Terms and Conditions

Valid Until	Aug 31, 2023	Pricing set forth herein is valid only if ClearGov Service Order is executed on or before this date.
Payment	Net 30	All invoices are due Net 30 days from the date of invoice.
Initial Period Rate Increase	3% per annum	During the Initial Service Period, the Annual Subscription Service Fee shall automatically increase by this amount.
Rate Increase	6% per annum	After the Initial Service Period, the Annual Subscription Service Fee shall automatically increase by this amount.

General Terms & Conditions

Customer Satisfaction Guarantee	During the first thirty (30) days of the Service, Customer shall have the option to terminate the Service, by providing written notice. In the event that Customer exercises this customer satisfaction guarantee option, such termination shall become effective immediately and Customer shall be eligible for a full refund of the applicable Service Fees.
Statement of Work	ClearGov and Customer mutually agree to the ClearGov Service activation and onboarding process set forth in the attached Statement of Work. Please note that ClearGov will not activate and/or implement services for any Customer with outstanding balance past due over 90 days for any previous subscription services.
Taxes	The Service Fees and Billing amounts set forth above in this ClearGov Service Order DO NOT include applicable taxes. In accordance with the laws of the applicable state, in the event that sales, use or other taxes apply to this transaction, ClearGov shall include such taxes on applicable invoices and Customer is solely responsible for such taxes, unless documentation is provided to ClearGov demonstrating Customer's exemption from such taxes.
Term & Termination	Subject to the termination rights and obligations set forth in the ClearGov Service Agreement, this ClearGov Service Order commences upon the Order Date set forth herein and shall continue until the completion of the Service Period(s) for the Service(s) set forth herein. Each Service shall commence upon the Start Date set forth herein and shall continue until the completion of the applicable Service Period. Customer shall have the option to Terminate this Service Order at the end of the Pro-Rata period, if applicable, and on an annual basis thereafter by providing notice at least sixty (60) days prior to the end of the then current Annual Term.
Auto-Renewal	After the Initial Period, the Service Period for any ClearGov Annual Subscription Services shall automatically renew for successive annual periods (each an "Annual Term"), unless either Party provides written notice of its desire not to renew at least sixty (60) days prior to the end of the then current Annual Term.
Agreement	This ClearGov Service Order shall become binding upon execution by both Parties. The signature herein affirms your commitment to pay for the Service(s) ordered in accordance with the terms set forth in this ClearGov Service Order and also acknowledges that you have read and agree to the terms and conditions set forth in the ClearGov ClearForms Service Agreement found at the following URL: http://www.ClearGov.com/terms-and-conditions . This Service Order incorporates by reference the terms of such ClearGov ClearForms Service Agreement.

Customer	
Signature	
Name	John Taylor
Title	Building Official

ClearGov, Inc.	
Signature	
Name	Bryan A. Burdick
Title	President

Please e-mail signed Service Order to Orders@ClearGov.com or Fax to (774) 759-3045

Customer Upgrades (ClearGov internal use only)

This Service Order is a Customer Upgrade	No	If Yes: Original Service Order Date	
---	----	--	--

Statement of Work

This Statement of Work outlines the roles and responsibilities by both ClearGov and Customer required for the activation and onboarding of the ClearGov Service. ClearGov will begin this onboarding process upon execution of this Service Order. All onboarding services and communications will be provided through remote methods - email, phone and web conferencing.

ClearGov Responsibilities

- ClearGov will activate ClearGov Service subscription(s) as of the applicable Start Date(s). ClearGov will invite the initial Admin User group to configure their account(s), and the Customer Admin User(s) will be responsible for inviting additional Users.
- ClearGov will assign a Implementation Manager (IM) responsible for managing the training, activation and onboarding process. ClearGov IM will coordinate with other ClearGov resources, as necessary.
- ClearGov IM will provide a Kickoff Call schedule to Customer's Primary Contact - to be scheduled within two weeks after the Service Order has been executed.
- ClearGov will provide Customer with direct support for the setup of the first Workflow, including instructions and guidelines and hands-on implementation assistance, if requested.
- In the event that Customer has purchased one or more ClearForms Quickstarts, for each QuickStart purchased, ClearGov will:
 - Provide an initial consultation to discuss the goals and details of Customer's initial Workflow
 - Create the initial Workflow, review with customer and provide updates prior to publication
 - Upload historical data, if any, for the selected initial Workflow
- ClearGov will make Customer aware of all training, learning and support options. ClearGov recommends all Users attend training sessions and/or read Support Center articles before using the ClearGov Service to ensure a quick ramp and success.

Customer Responsibilities

- Customer will designate a Primary Contact for onboarding and implementation.
- Customer's Primary Contact will coordinate the necessary personnel to attend Kickoff Call within two weeks after the Service Order has been executed. If Customer needs to change the date/time of the Kickoff Call, the Primary Contact will notify the ClearGov IM at least one business day in advance.
- In the event that Customer has purchased one or more ClearForms Quickstarts, for each QuickStart purchased, Customer will:
 - Coordinate the necessary personnel to provide input on the initial Workflow
 - Provide the applicable historical data in an Excel or comma-delimited format - PDFs are not acceptable
 - Review and provide feedback on the initial Workflow in a timely manner prior to publication
- Customer shall be responsible for creating, launching and managing customer Workflows - including provision of all necessary brand assets - and for adding link(s) to Workflows within Customer's Website.



Hi John,

In the interest of clarity, I want to provide a direct response to the questions in the 'Request for Final Cost' document. Everything detailed here is described in more detail in our proposal.

The City of Lake Elmo is looking for the final cost of installing new Permitting Software. Vendors have already submitted cost estimates and the cost need to reflect a January purchase date. The following updated information is needed:

1. Pricing for the new start date. Including the cost for any training, transfer of files, template design and other actions needed to install and use the new software?

Cost is included in the proposal for of the above. Annual cost is \$17,500.00 for the software, with a one time set up fee of \$11,000.00. The total 1st year cost is \$28,500.00, the annual ongoing cost is \$17,500.00

2. Is the pricing based on population (Lake Elmo - 13,800, users – 10-15 or by other determinations)?

Cost is based on population. User licenses are completely unlimited, Lake Elmo can give as many staff access as they like.

3. Does the pricing include all the modules or is there separate pricing for Building, Code Enforcement, Planning, Financing, Administration, Licensing and other modules?

Pricing includes all modules.

4. The city is currently using Permit Works and will need to have all current files moved into new software.

This is included in the cost proposal under the line item "Data Import".

5. What is the online payment system being used by your software and the costs associated with it?

Cloudpermit works with 29 different online payment systems. The City may choose whichever one they wish. A list of available systems is attached separately to the email this proposal was sent with. Each provider has different costs.



6. The estimated yearly renewal costs. Are the future price increases based on population, software users or other means?

Renewal costs are included in the proposal. The annual cost remains the same for each of the first three years. After that, a 5% annual increase is added to any renewal year. Price does not increase based on population changes. Population is used purely to set the initial cost at time of acquisition.

7. If you haven't previously provided contact information from other MN entities around the size of Lake Elmo (roughly 13,800) using your product, please provide.

North Mankato, MN

Megan Vossen, Permits

507 625 4141, meganv@northmankato.com

Below are some other out of state references we feel would be worth your time to speak with:

Boone County, IL

Drew Bliss, Building Official

dbliss@boonecountyil.gov

(815) 544-6176

The Town of Aurora and East Aurora, NY

Elizabeth Cassidy, Manager

ecassidy@townofaurora.com

Office 716-652-7591



8. What other types (building software can it work with (Bluebeam, E-codes)?

Cloudpermit works with the following building software's:

- Bluebeam, ProjectDox/Avolve, DigEplan**

Cloudpermit also works with:

- GIS**
- Laserfiche**
- Financial software**
- Over 30 different online payment gateways**

Please let me know if you have any further questions, you can contact be directly via my details below:

Thanks,

Peter Rotenberg

Director of Sales

647.461.2586

Peter.Rotenberg@cloudpermit.com

cloudpermit.com



Cloudpermit 

Pricing Proposal

Cloudpermit

11911 Freedom Drive, Ste. 720
Reston, Virginia 20190
United States

Proposal

Proposal #: Q-01950-2
Customer #: CUST-0006326
Date: 2023-11-08
Expires On: 2023-12-06
Sales Person: Peter Rotenberg
Sales Person Email: peter.rotenberg@cloudpermit.com
Delivery Method: E-Mail

Ship To

John Taylor
Lake Elmo
3800 Laverne Avenue North
Lake Elmo, Minnesota 55042
United States
(651) 747-3910
jtaylor@lakeelmo.org

Bill To

Lake Elmo
3800 Laverne Avenue North
Lake Elmo, Minnesota 55042
United States

Subscription

Product Name		Year 1	Year 2	Year 3
Building	Start Date	2024-04-30	2025-04-30	2026-04-30
	Total	USD 8,000	USD 8,000	USD 8,000
Code Enforcement	Start Date	2024-04-30	2025-04-30	2026-04-30
	Total	USD 2,500	USD 2,500	USD 2,500
Licensing and Registration	Start Date	2024-04-30	2025-04-30	2026-04-30
	Total	USD 3,000	USD 3,000	USD 3,000
Planning	Start Date	2024-04-30	2025-04-30	2026-04-30
	Total	USD 4,000	USD 4,000	USD 4,000
Subscription Total:		USD 17,500	USD 17,500	USD 17,500

Service

Description	Total
Data Import	USD 5,000
Implementation Fee - Building Software Solution	USD 2,000
Implementation Fee - Code Enforcement Software Solution	USD 1,000
Implementation Fee - Licensing and Registration Software Solution	USD 1,000
Implementation Fee - Planning Software Solution	USD 2,000
Service Total:	USD 11,000

Customer Total First Year: **USD 28,500**

Terms & Conditions

Validity of this quote: 30 days from date of creation
Term: 3 years, billable annually

Payment Term: Net 30 days from Invoice Date

Invoicing: Subscription invoice to be sent after contract is signed and then annually.

Implementation payments: 50% (M1) due upon implementation start and 50% due after implementation is complete (M2).

All stated prices are exclusive of any taxes.

Annual Subscription Fee

Cloudpermit's software licensing model is different from most vendors because it is designed to reflect the needs, convenience, and business realities of small and mid-sized local governments.

The annual fee includes everything the client needs to operate and maintain the software on an ongoing basis. There are no hidden fees and no cost for newly developed features in each module.

Included in the Annual Subscription Fee:

- ✔ Unlimited user licenses for municipal staff
- ✔ Access to all software features (including mobile features)
- ✔ Unlimited data storage
- ✔ Online portal for public users to submit online
- ✔ Core integrations (GIS, Online Payments)
- ✔ Support and maintenance (described below)

Implementation and Training

Implementation

Cloudpermit is an out-of-the-box SaaS solution purpose-built for local government building departments. The implementation process is standardized, while considering the specific and unique needs of each client. Implementation typically takes between 4-8 weeks. Little to no IT support is required from the client.

Training

Cloudpermit provides training for end-users and administrative users throughout the implementation of the software. Training takes between 4-6 hours and is done in the client's uniquely configured environment.

Maintenance and Support

Maintenance

Maintenance is included with the annual subscription fee. Cloudpermit updates the software every 3-4 weeks, for a minimum of 12 updates per year. Updates are managed by Cloudpermit's development team, requiring no effort from the client's end-users or IT staff. Updates are hot-patched, meaning there is no system downtime for end-users. Cloudpermit's release notes are public and available at the following link:

<https://support.cloudpermit.com/support/solutions/67000379501>

Support

Support is included with the annual subscription fee for each solution.

Cloudpermit provides the following support resources:

- ✔ Phone-in help desk support – Available from 7:30AM-8:30PM EST Monday-Friday
- ✔ Industry standard support ticketing portal for clients
- ✔ Self-help portal for municipal end-users, as well as public applicants (builders/developers)

Cloudpermit's support portal is updated in line with monthly releases, and is available to the public at the following link:
<https://support.cloudpermit.com/support/home>

Our Solutions

Building Permitting and Licensing
Software Made Simple



Building Permitting

Use government permitting software to provide better citizen service, organize your building permits, and accept complete applications.



Business Licensing

Enjoy business license software that lets your team issue and renew business licenses, access property information, and use interactive maps.



Planning & Zoning

Take advantage of planning and zoning software to issue land use permits and achieve greater land management.



Code Enforcement

Benefit from code enforcement management software that allows code compliance officers to accept complaints online, view case history in chronological order, and communicate with direct and group messages.

Don't take our word for it...

Listen to our partners

“Every part of **my Cloudpermit journey has been easy** and everything that I was promised in the sales process has been delivered.”

Julie Wicker, Clerk for the Town of Wilson, Wisconsin

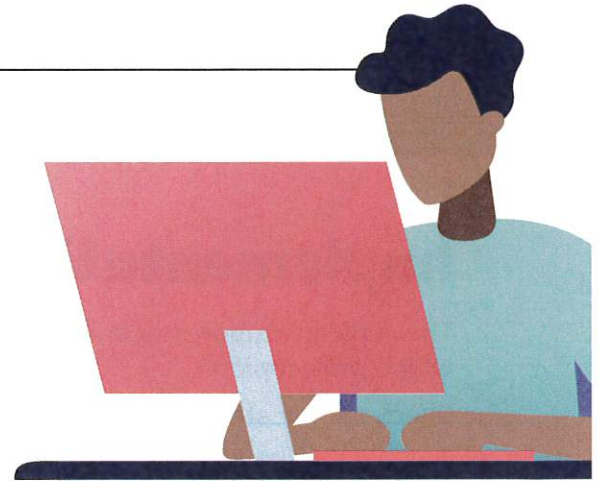
“We were confident with our decision because **Cloudpermit offered what we needed**, fit our budget, and worked with many other governments.”

John Snelson, Code Enforcement/Zoning Officer for White Oak Borough



“Our Customer Success Manager was amazing at walking us through the software and went above and beyond our expectations. He ensured we had the necessary tools for success, answered our questions, and gave us the confidence to explore new things. **The excellent customer service we received during implementation enabled us to provide excellent service to our citizens.**”

Henry Hemphill, City Planner for the City of Fruita



850+

Customers

19M

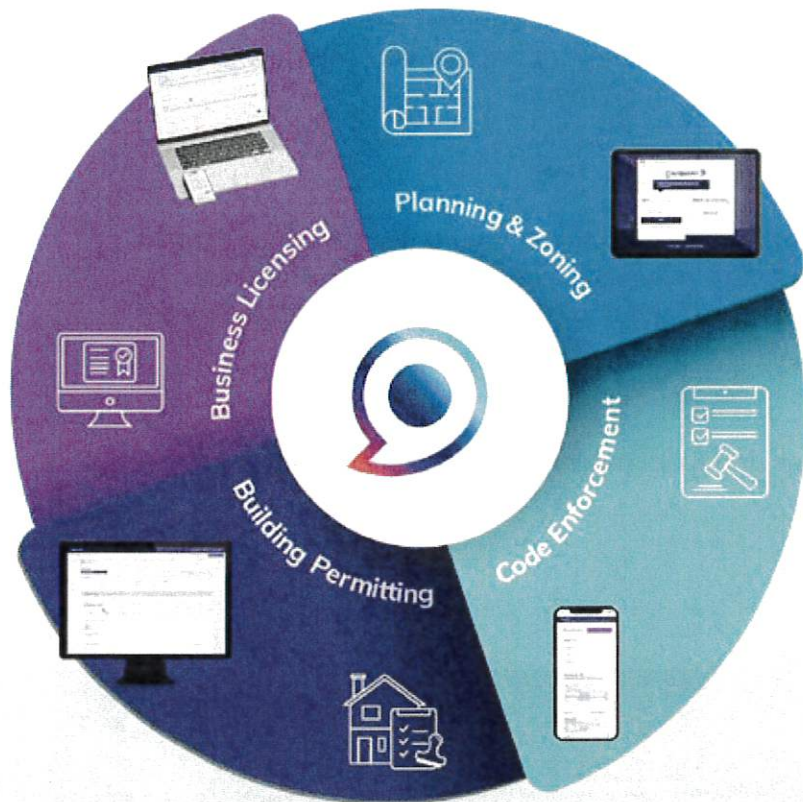
Inspections

18M

Building Permits

45M

Citizens



Enjoy community development software that was designed with **governments and agencies just like yours.**



@Cloudpermit | [Cloudpermit.com](https://cloudpermit.com)

Implementation Timeline

The implementation schedule is mutually agreed upon before the kickoff meeting and documented with a project plan.

Check out our standard implementation schedule below.

Cloudpermit Estimated Project Timeline	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	
Building Department	5-6 weeks																			
Code Enforcement						4-5 weeks														
Planning Department										8-10 weeks										

Implementation Model

Both Cloudpermit's team and the customer are responsible for performing tasks during the implementation process.

Kickoff:

The kickoff meeting starts the implementation process. Your designated Implementation Specialist, your staff, and key stakeholders meet to review an overview of the software, discuss goals and objectives, schedule, and plan for a successful implementation.

Workshop:

The workshop ensures that the Implementation Specialist has a clear understanding of the business processes, details that government staff needs to collect from the applicant, fee schedules, payment providers, any needed integrations and costs, and any needed templates.

Configuration:

The software is configured with the features and functionalities the customer needs.



Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, business licensing, planning & zoning, and code enforcement.



Aim your phone camera here and tap the link that appears!



@Cloudpermit



Cloudpermit.com

Cloudpermit Implementation Model



Training & Testing:

The customer will meet with their Implementation Specialist for two standard training sessions. Additional Training: Most customers feel prepared to start using Cloudpermit at the end of their training sessions. Sometimes, additional training is necessary. In this case, customers can order additional training for an additional cost.

Go-Live:

The go-live includes a go/no go decision prior to a scheduled go-live meeting where the training environment goes to production. At the go-live meeting, the customer will submit their first building permit, application, or create their first case within Cloudpermit.

Milestones & Acceptance Criteria:

Milestones are used to accept that you have completed a step in the implementation process. As each milestone is completed, the customer receives and must sign a Milestone Acceptance Document to agree the milestone has been reached.

If there are any go-live blockers or corrections needed, customers must inform Cloudpermit's team.

Change Management:

If additional needs are identified during the implementation process that are outside of the project scope, a change request is made.

Additional Services Cost

Cloudpermit can provide additional services as per the price list with a change order.

For on-site meetings, travel and per diem expenses will be invoiced to the customer in accordance with the Cloudpermit Travel Policy. This includes airfare, mileage, hotel accommodations, and daily per diem.

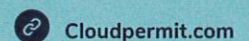
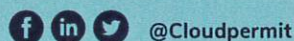
Let us know if you have any questions and we're looking forward to working with you.



Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, business licensing, planning & zoning, and code enforcement.



Aim your phone camera here and tap the link that appears!



Where is the data stored?

All data is stored in the US and hosted on Google Cloud Services.

How is data stored securely?

Triple redundant co-location is in place with three geographically separate data centers. All data is encrypted both in transit and at rest.

How often are passwords reset?

Minimum password strength requirements are in place for all users, and passwords must be reset every 6 months.

How often are backups done?

System backups are done hourly.

What is Cloudpermit uptime guarantee?

Cloudpermit guarantees 99.99% uptime annually.

Who owns the data?

The client owns their data, Cloudpermit merely hosts it.

Is there a limit to the amount of data storage?

There is no data storage limit..

What are the benefits of Cloudpermit's security?

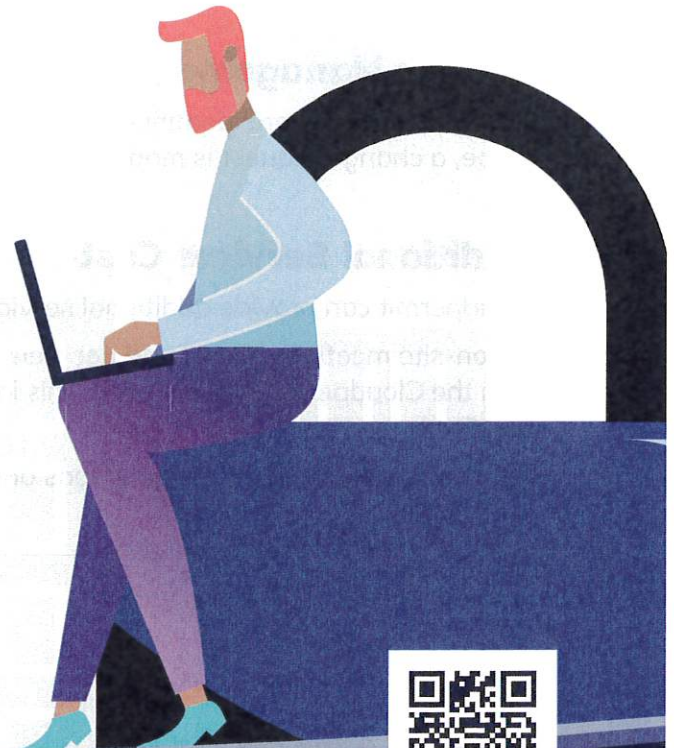
Cloudpermit's security measures ensure that client data is stored safely, and accessibility is maintained at all times.

Can I view more information about Cloudpermit's security protocols?

Yes, you can visit our [website](#) for more information on our security measures.

Are there any known security issues with Cloudpermit's system?

No, Cloudpermit's security system is regularly updated to prevent any security breaches.



Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, business licensing, planning & zoning, and code enforcement.



Aim your phone camera here and tap the link that appears!

Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

Accept, Review, and Issue Building Permits

Work online to receive and issue building permit applications with ease and without paper.

Receive Complete Building Permit Applications

Force citizens to complete applications before they can click 'submit' with mandatory input fields.

Conduct On-site Mobile Building Inspections

Manage all data, contact information, drawings, reports, etc., in the field by starting and finishing building inspections on-site.

Use Maps Integrated with Your GIS

Select building permit locations, view detailed property information and plan optimal inspection routes.

Change and Modify Workflows

Select building permit types from a pre-configured structure, and manage requirements, including forms, drawings, reviews, and inspections for each type of application.

Gain Insight with Reports

Create reports, such as for permits, assessments, payments, inspections, reviews, etc.

Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

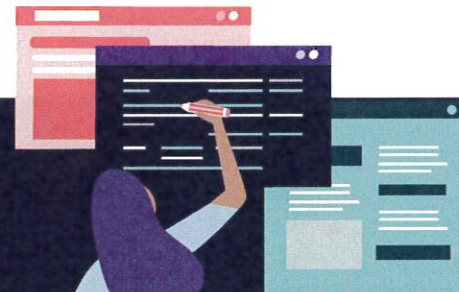
Keep All Communication in One Place

Send direct and group time-stamped messages for organized conversations.

Get Up and Running Quickly

Start using Cloudpermit within weeks without costly integrations or IT support.

Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, planning & zoning, and code enforcement.



Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

Accept Complaints from Citizens

Accept complaints and determine what contact information is required for complainants.

Create Cases and Violations in the Field

Work in the field and search past building permits, previous complaints, cases, and history of a property.

Conduct On-site Inspections

Input notes and complete reports in the field on any mobile device.

View Case History in Chronological Order

Access data, contact information, reports, photos, etc., in chronological order.

Share Photos

Upload photos to cases, violations, and inspections.

Use Maps Integrated with Your GIS

Select case locations, view detailed property information, plan optimal inspection routes.

Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

Keep All Communication in One Place

Send direct and group time-stamped messages for organized conversations.

Get Up and Running Quickly

Start using Cloudpermit within weeks without costly integrations or IT support.

Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, planning & zoning, and code enforcement.



Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

Accept, Review, and Approve Planning Applications

Work online to receive and approve planning applications with ease and without paper.

Manage Meeting Dates and Agendas

Keep track of meetings, manage pre-consultation requests, and generate agenda templates.

Organize Public Notice Notifications

Manage and send public notice notifications, find public notice radius, and track public opinion.

Circulate Planning Applications Internally and Externally

Send multiple circulation requests in real-time and receive responses without paper.

Use Maps Integrated with Your GIS

Retrieve detailed and accurate property information, including various layers such as flooding maps and heritage areas.

Change and Modify Workflows

Select application types from a pre-configured structure, and manage requirements, including forms, drawings, and reviews for each type of application.

Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

Keep All Communication in One Place

Send direct and group time-stamped messages for organized conversations.

Get Up and Running Quickly

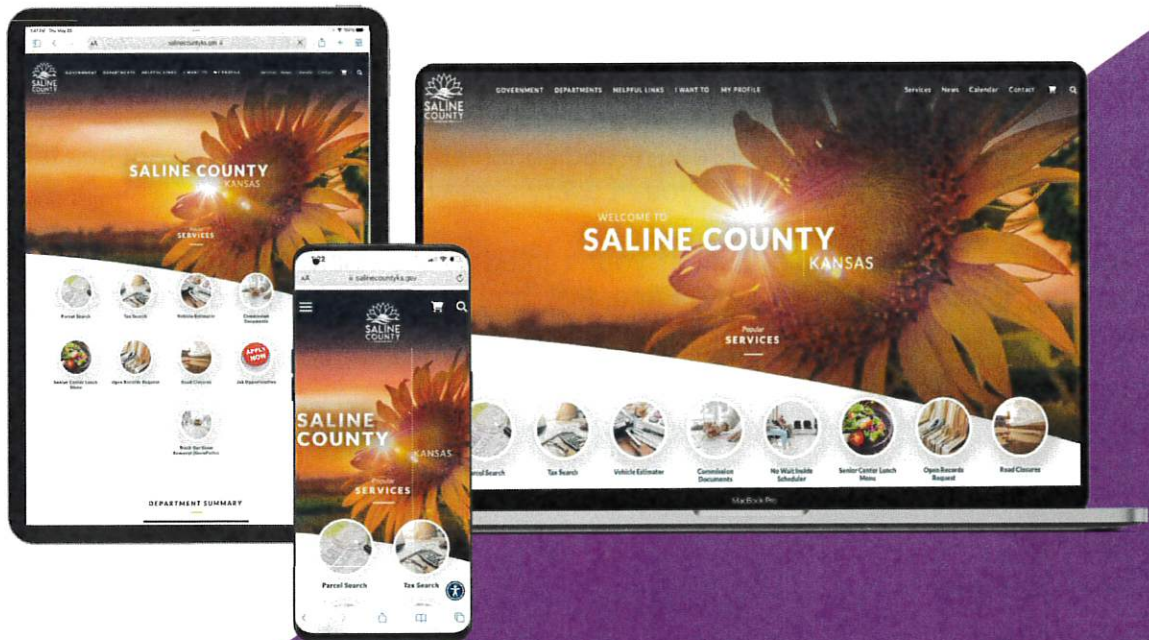
Start using Cloudpermit within weeks without costly integrations or IT support.

Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, planning & zoning, and code enforcement.



Community Development Software

Proposal for: City of Lake Elmo, MN



GOVBUILT

TOMORROW'S GOVERNMENT BUILT TODAY

November 7, 2023

John Taylor
City of Lake Elmo
Building Official

Dear John,

As modernization and citizen requests for more streamlined processes continue to grow, we understand that finding the right solution to support your evolving needs is more important than ever. It is with great enthusiasm that we present GovBuilt - a cutting-edge, no-code platform designed to align perfectly with your technology goals while enhancing citizen services, all within a cost-effective framework.

At GovBuilt, our commitment lies in providing a comprehensive solution that fosters community engagement, seamlessly integrates with existing applications, and facilitates interdepartmental communication to meet the demands of your stakeholders. Our aim is to optimize your department's operations and grant the public easier access to exceptional services.

We believe that our experience working with government agencies has given us the expertise necessary to provide you with a modern, streamlined, and efficient solution that is tailored to your specific needs. With unlimited access for all departments across the City of Lake Elmo, our mobile-responsive platform will enable inspectors to work remotely and provide you with the flexibility to manage your operations from anywhere.

Should you have any inquiries or require additional information, please do not hesitate to reach out to us. We stand ready to assist you at every stage of this process.

Thank you for considering GovBuilt as your trusted solution partner. We eagerly anticipate the opportunity to collaborate with Lake Elmo, MN, and contribute to the continued success of your thriving community.



Robert J. Carl

GovBuilt LLC
rcarl@govbuilt.com
301-514-5009

Executive Summary

Experience of the Firm

GovBuilt is a privately held corporation headquartered in Manhattan, Kansas that was founded in 2019. Our founders have over 60 years of combined experience in the public sector and identified a critical need for an affordable, comprehensive, cloud-based solution for Permitting and Licensing. With many vendors offering similar solutions at growing costs and with lengthy implementation timelines, we understand the frustration shared by customers like you. That's why GovBuilt was formed - to enable digitization of regulatory processing and provide a comprehensive technology that delivers the future of government. We are committed to delivering quality services and solutions to municipalities of all sizes and budgets, recognizing that government is tasked with delivering more with less funding. As your partner, we are here to serve you and support your goals for the future.

Ability of Personnel



Matt Kenney – Co-Founder, CTO

Project Role – CTO

A Certified ScrumMaster, Certified Scrum Product Owner and Certified Advanced Scrum Developer. Matt has led teams that created the technology that runs more than 3,500 local government websites and serves 65 million citizens across North America with 1.5 billion page views annually.



Robert Disberger – Co-Owner, VP of Sales

Has 18 years in the technology space. Robert's previous roles include Director of Sales for the Central and West Regions at Accela, and Director of the West Region at CivicPlus.



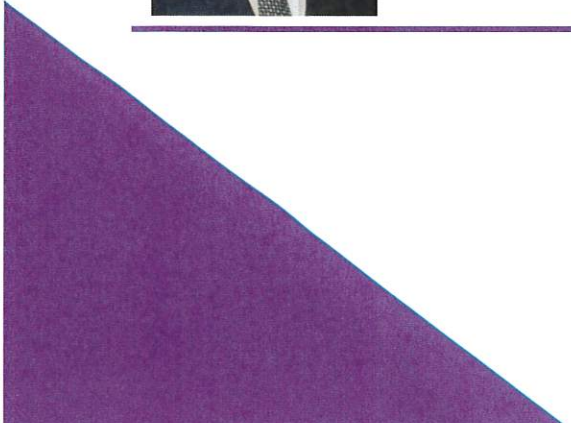
Tim Grant – Co-Founder, COO

Has been part of 2,000 software implementations for federal, municipalities, and higher education organizations.



Rob Carl – Sr. Account Executive

Seasoned sales professional with nearly 20 years' experience working in the federal, sled and enterprise space. Technical background with Microsoft and Cisco technologies.



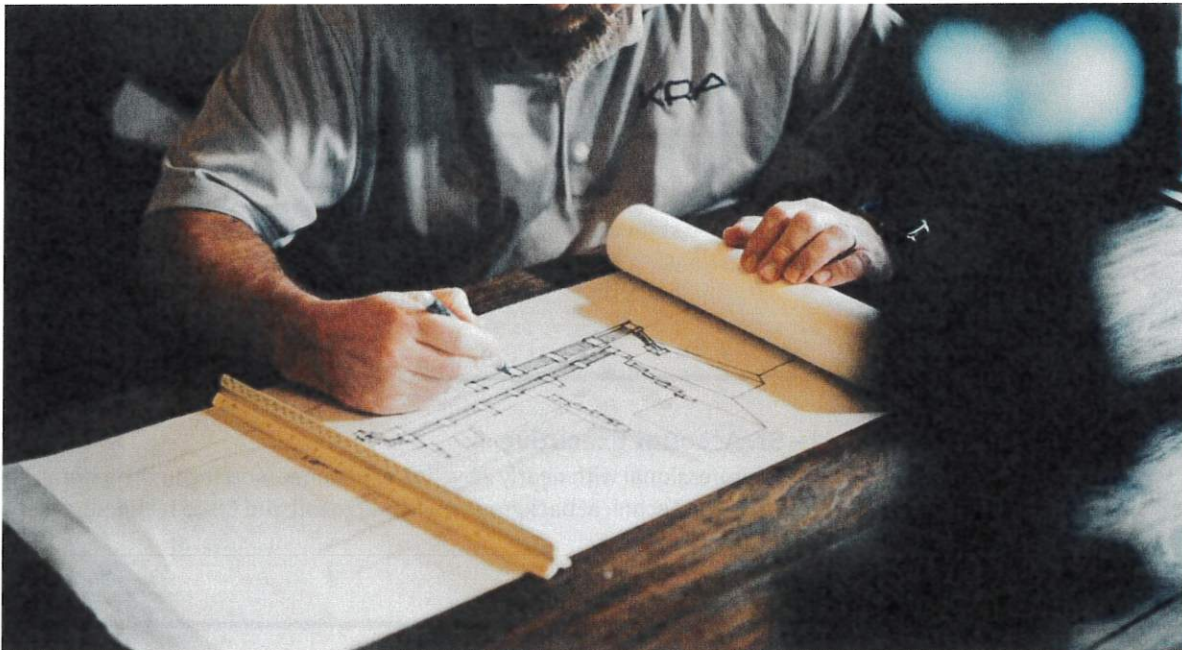
Executive Summary

Understanding the City's Vision

The City of Lake Elmo's Building and Inspections department is seeking a modern, integrated solution to enhance permitting and inspection processes and provide transparent government services to the community through a public portal. GovBuilt understands that your current system is no longer adequate and was designed with the latest software featuring drag-and-drop workflows and API-first functionality, eliminating the need for expensive custom implementations or integrations. We have vetted your current vendors and can easily integrate with them.

GovBuilt's Software as a Service (SaaS) Applications offer a subscription-based solution that combines various software solutions, including Right-of-way Permits, Building permits, Code Enforcement, Inspections, and Business Licensing, into a single, integrated system. This provides citizens with 24/7 access to government services while automating manual processes, streamlining business processes, and enabling communication and collaboration across departments, citizens, and third-party applications. The GovBuilt Applications are scalable and adaptable, ensuring a successful partnership for the long term.

We believe that GovBuilt can meet your project goals, and we look forward to partnering with you for a more efficient and transparent future.



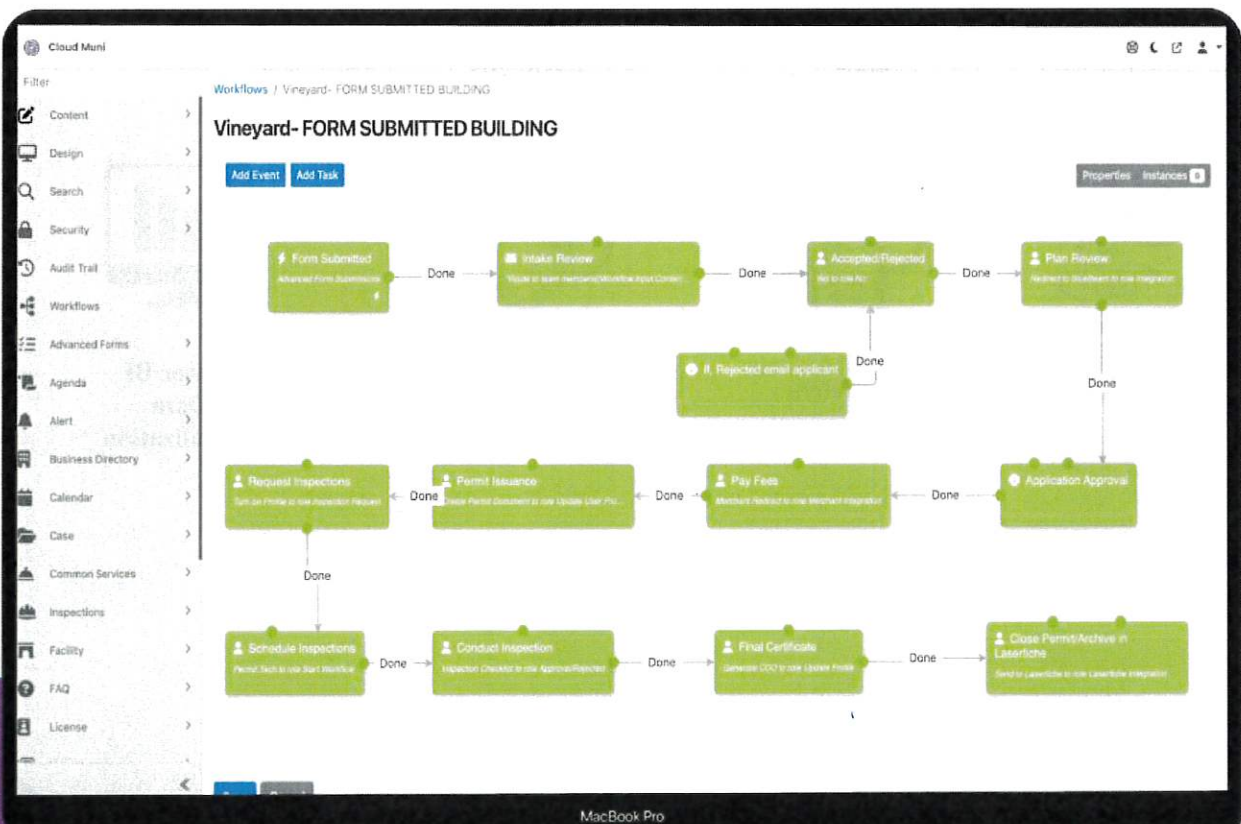
Executive Summary

GovBuilt provides solutions to government agencies of all sizes; to automate and streamline regulatory processes for planning, building, licensing, service requests, and more.

2020 introduced a whole new set of challenges to municipal services, including closed offices, remote staff, and disconnected processes. GovBuilt is focused on making it easier to open and run your department. With our comprehensive and 24/7 accessible solutions, the Building and Inspections Department will gain the ability to accept, process, and approve permits and plans, from anywhere at any time.

With GovBuilt, your department will have the flexibility, options, and scalability to enable innovation over time without the need to invest in new technology. Regardless of agency size or budget, our solution streamlines and connects services through an online public portal, tailored workflow, integration with other city resources, status tracking, and access 24/7 from anywhere for remote workers.

- GovBuilt enables two-way engagement with the public, allowing them to track statuses and participate in decision-making processes.
- GovBuilt's drag-and-drop workflow technology and easy-to-use form center allows agencies to create and deploy innovative solutions to extend the value of our platform, creating a new online catalog of services.
- See a first-hand example of your Building Permit workflow built into the GovBuilt Platform (see below)



Overview and Capabilities

Cross Collaboration, Multiple Departments, One Platform



Business Licenses



Inspection



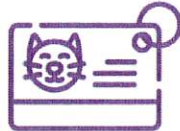
Solar Applications



Rental Management



Public Works



Pet Licensing



Restaurant Inspections



Environmental Health

Built API First – Connect to Other Online Tools



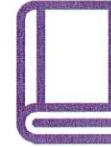
GIS



Electronic Plan Review



Online Payments



ICC Codes



Finance & Accounting



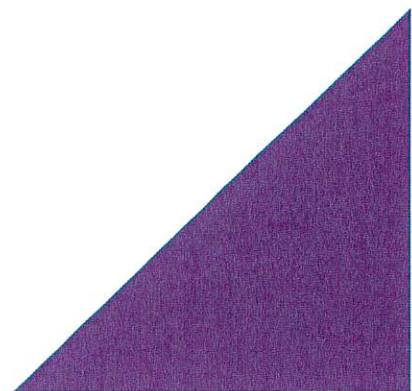
Document Management



Cloud Security



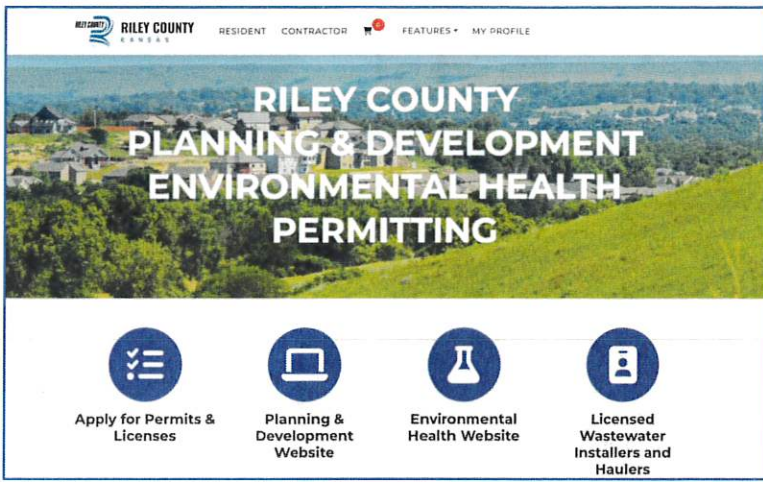
Power BI Data Visualization



Resident/Contractor Portal

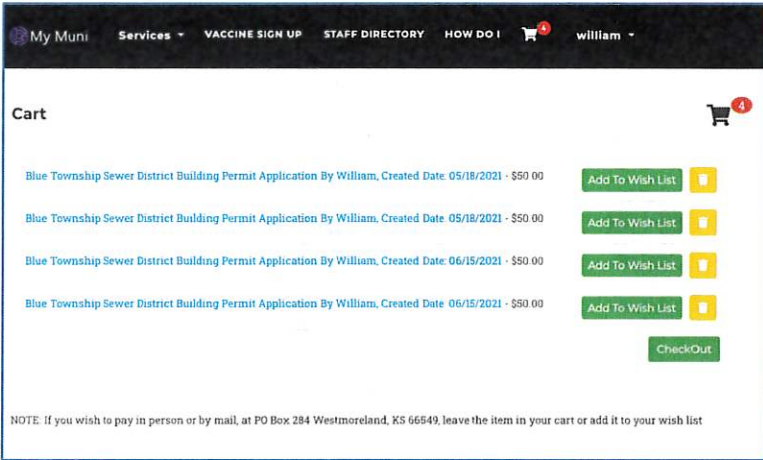


1. Custom Portal Design
2. Online Shopping Cart
3. Personalized User Profile
4. Easy Fillable Forms
5. ADA Compliant
6. Mobile responsive



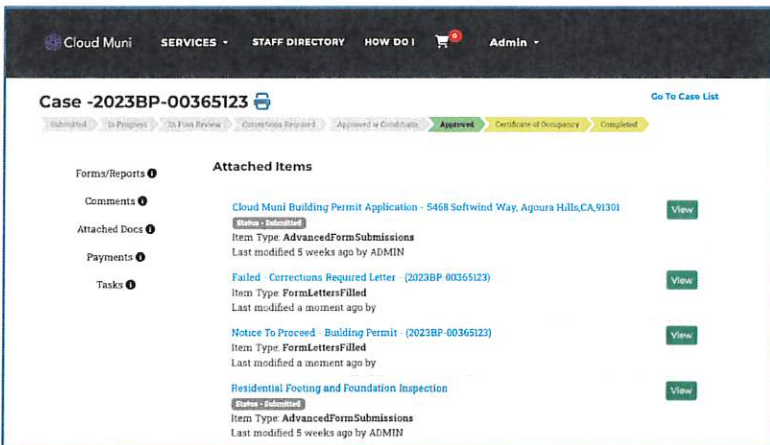
Resident Portal

Your applicants will be able to create a profile to keep track of their cases, form submissions, licenses, and payment history. All communication with your citizens can be done securely through their profile. Our portals are highly customizable and easy to navigate.



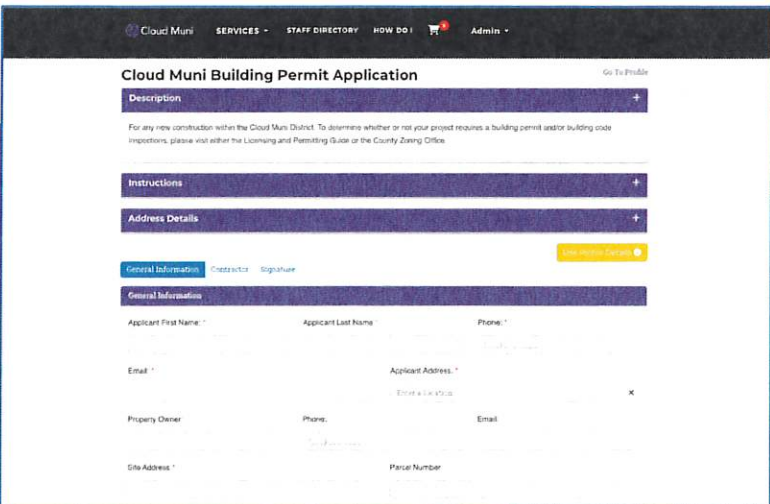
Shopping Cart

Allow your citizens to checkout once with multiple items in one transaction to reduce the convenience fees that are rolled over to the citizen. Our wish list feature allows citizens to store items they want to wait to purchase. Our shopping cart can integrate with your current merchant provider.



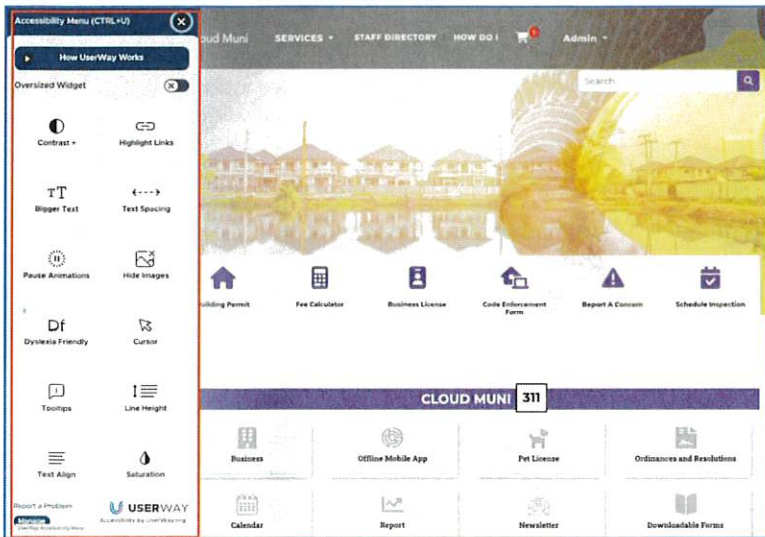
Personalized User Experience

Each applicant, whether a contractor, developer or a resident will have the ability to view each application. Our pathway to success will show them in real-time where their application is in the process. Chat, inspection scheduling and document downloads are some of the features that will drive engagement with your applicants.



Advanced Forms

Use our drag-and-drop form creator to create and edit forms for your citizens to self-serve. The ease of use will allow you to make and take online forms in minutes. Take payments, create cases, licenses, create organization-only forms, and much more. Forms have smart features that will work for you.



ADA Section 508 Compliance

GovBuilt provides highly compliant solutions based on WCAG 2.0 A and AA guidelines, which exceeds ADA accessibility requirements. GovBuilt will provide a modern experience while meeting accessibility standards for all users. Each portal will be launched with UserWay's tools

<https://userway.org/>

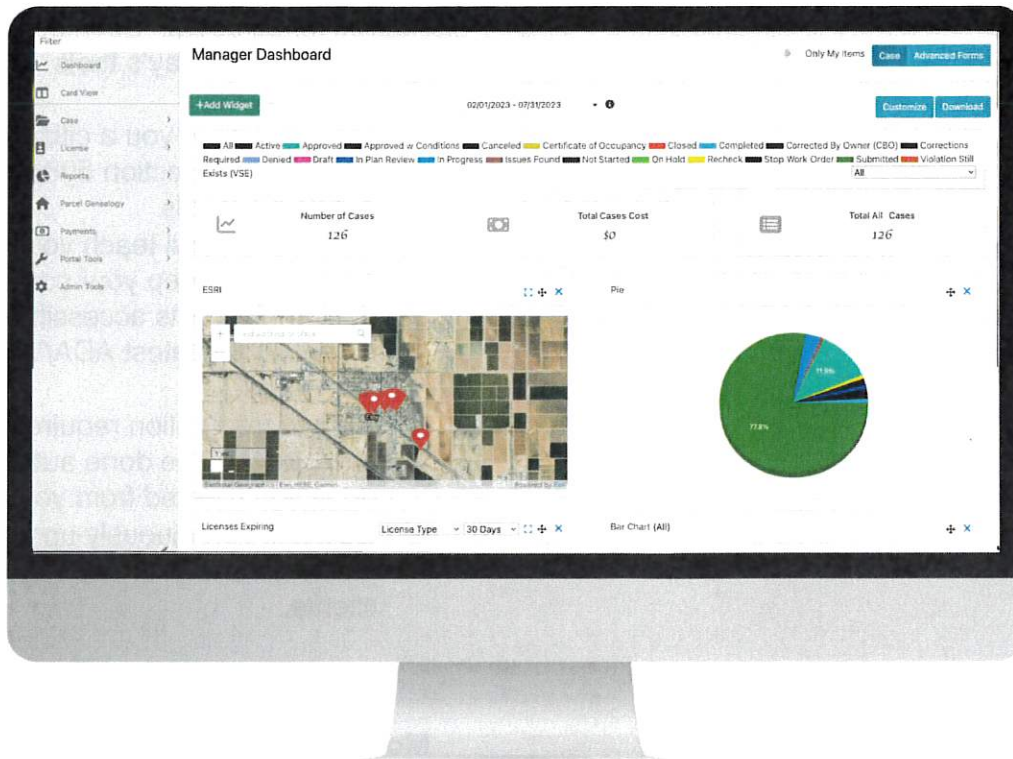
- We will deliver you a citizen portal that meets ADA (Section 508) and WCAG 2.0 A and AA levels.
- Our trainers will teach your staff best practices to keep your content and design elements accessible and up to date with the latest ADA/WCAG standards.
- If a new regulation requires a code change it will be done automatically with no action needed from you.
- GovBuilt continuously updates our best practices and provides regular updates to clients.



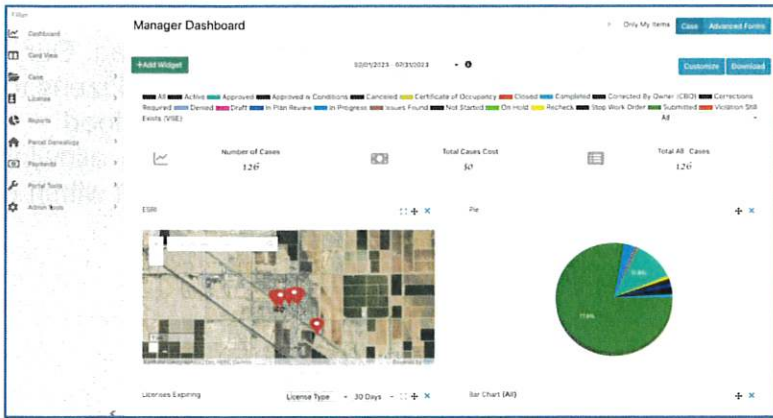
Mobile Responsive

Whether accessed from an Android, iOS, or any other mobile operating system, GovBuilt's interface remains intuitive and fully functional. This inclusive approach enables government officials, citizens, and stakeholders to engage effortlessly with the platform's array of features, promoting efficient collaboration and empowering the community to participate actively in shaping their shared future.

Staff Portal

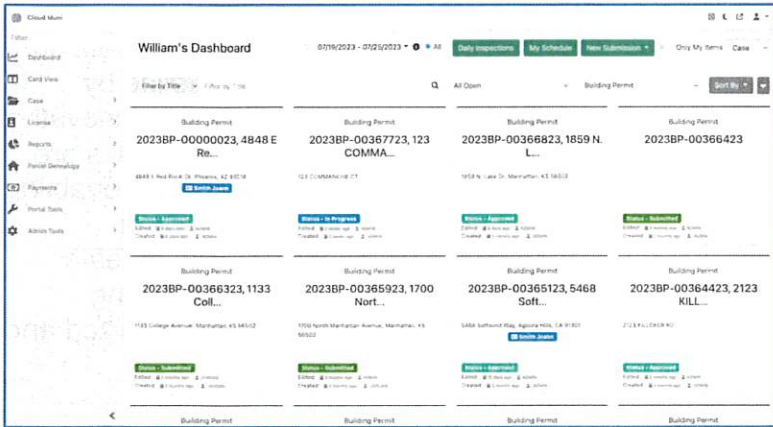


1. Main Dashboard
2. Inspector Dashboard
3. Inspection Routing
4. Case Management
5. License Management
6. Planning
7. Parcel Genealogy
8. Reports
9. Form Builder
10. Mobile App



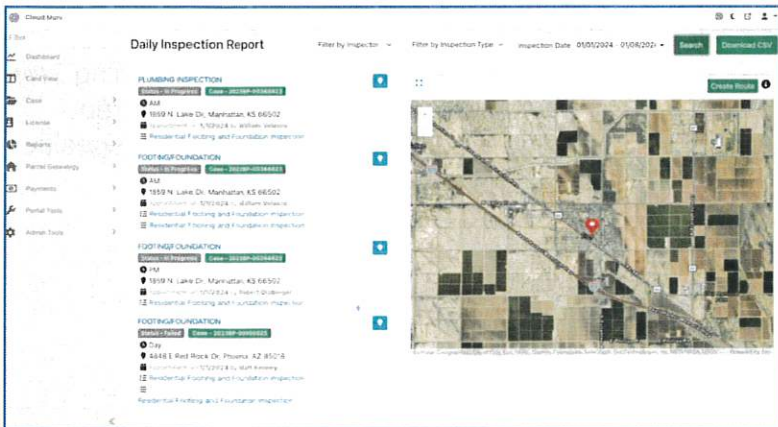
Dashboard

Allow each user to have their own dashboard customized with our drag-and-drop interface using our Chart Widgets. Use our ESRI Map Report to show a time-based report with map pins of form submissions with ability to integrate your custom ESRI layers. You can also create custom reports that are searchable, exportable, and can be emailed to you on a custom schedule.



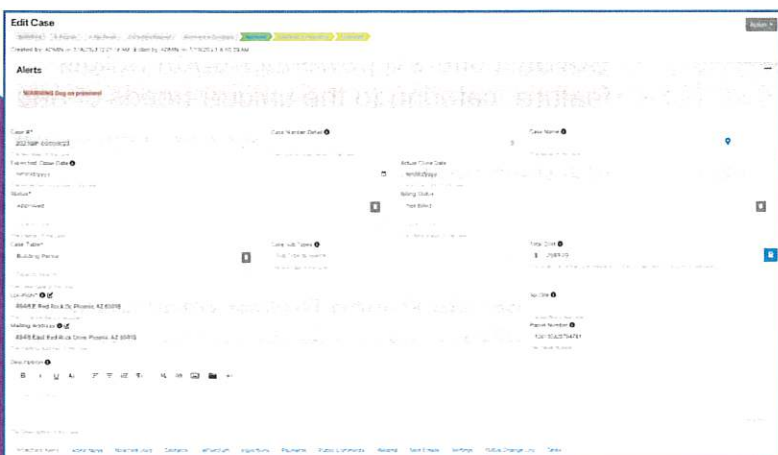
Inspector Dashboard

The Inspector Dashboard in GovBuilt is a user-friendly tool that allows city inspectors to efficiently manage their workload by providing a clear view of upcoming permit inspections. Inspectors can personalize their dashboard to focus on relevant tasks, ensuring maximum productivity and eliminating distractions. With the ability to save their custom configurations, inspectors can easily access their preferred setup, optimizing their workflow and delivering exceptional service to their community.



Inspector Routing and Scheduling

The GovBuilt Inspector Scheduling and Routing Tool provides city inspectors with an optimized daily route based on Google Maps and time scheduling. It also allows on-the-road access to inspection checklists, streamlining their workflow and enhancing productivity for delivering efficient and top-notch service.



Case Management

Create a case to track all related records for an event, including all form submissions, permits, inspections, and custom content types in one place. Communicate with citizens via comments, track admin notes, and attach documents.



License Management

This module is completely integrated. Our customizable form builder allows citizens to enter contractor, business, mobile food vendor, and other licenses online – allowing you to track, renew, and interact all within our user-friendly web interface.

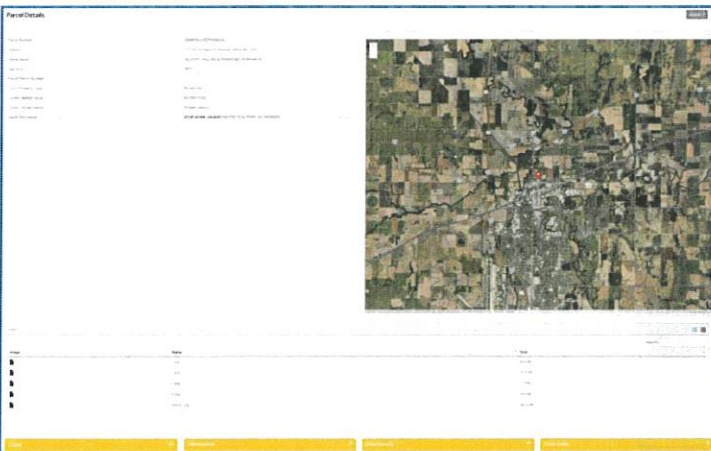
Print



Team Member	Status	Type	Due Date	Status Change Date	Action
James Durling	Staff Review	Staff Review	09/06/2023	09/06/2023 12:21 AM	Action
Matt Kenney	COI Changes	COI Changes	07/26/2023	07/19/2023 11:21 AM	Action
James Smith	Active	Blockfill	07/02/2023	07/02/2023 12:01 AM	Action
William Jenkins	Submitted	Plan Review	07/02/2023	07/16/2023 12:01 AM	Action
James Durling	Submitted	Plan Review	07/02/2023	07/16/2023 12:01 AM	Action
James Durling	Notify Applicant	Notify Applicant	07/12/2023	07/16/2023 12:21 AM	Action
Teri Grant	Completions Review	Completions Review	07/02/2023	07/16/2023 12:21 AM	Action
Matt Kenney	INS Checks & Maps	INS Checks & Maps	07/19/2023	07/19/2023 11:21 AM	Action
Joshua Rosen	External Agency Review	External Agency Review	07/16/2023	07/16/2023 12:21 AM	Action
William Jenkins	Board of Zoning Appeals	Board of Zoning Appeals	07/16/2023	07/16/2023 12:21 AM	Action
James Durling	Submitted	Application Submitted	07/16/2023	07/16/2023 12:21 AM	Action
James Durling	Submitted	BZA Packet Preparation	07/12/2023	07/19/2023 12:21 AM	Action
Robert Dreibeger	Submitted	Notify Property Owners	06/09/2023	07/19/2023 12:21 AM	Action
James Durling	Submitted	Send Notices to Homeowner	06/02/2023	07/19/2023 12:21 AM	Action

Planning Management

GovBuilt's Planning Task Management feature revolutionizes the planning timeline by automating the process. With this innovative system, future dates for multiple tasks are seamlessly fetched and organized, enabling efficient management. The platform intelligently assigns these tasks to team members for completion, streamlining workflow and ensuring a well-organized and timely execution of projects.



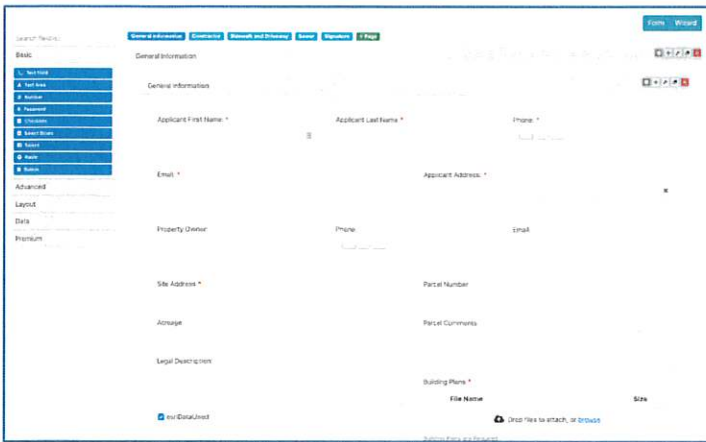
Parcel Genealogy

Create and track all parcels in your area over the entire history of the parcel including any splits, builds, and changes into different building types. Find all activity on a specific property, include code violations.

Name	Description	Date Created	Owner	Action
442 License	442 License	10/06/2022	KDMN	Action
67th Home Use	All 67th Home Use for Licenses (Placed Based on the Current Date Assigned Fee and the Action Date)	08/29/2023	KDMN	Action
67th Solar Companies	All Business Tax Requests for companies with more than 100 Solar employees	12/04/2023	KDMN	Action
67th Business	Jobs at Business Generated for a Trip-PI Request for 67th Central Park Drive	10/11/2023	KDMN	Action
67th Inspection Report	All case inspection requests created transferred or submitted created by 67th Home Use and 2023	12/13/2023	KDMN	Action
67th Inspection Report	67th Inspection Report	04/27/2019	KDMN	Action
67th Inspection Report	67th Inspection Report	02/04/2021	KDMN	Action
67th Inspection Report	67th Inspection Report	04/22/2019	KDMN	Action
67th Inspection Report	67th Inspection Report	10/22/2016	KDMN	Action
67th Inspection Report	67th Inspection Report	06/02/2016	KDMN	Action
67th Inspection Report	67th Inspection Report	08/09/2012	KDMN	Action

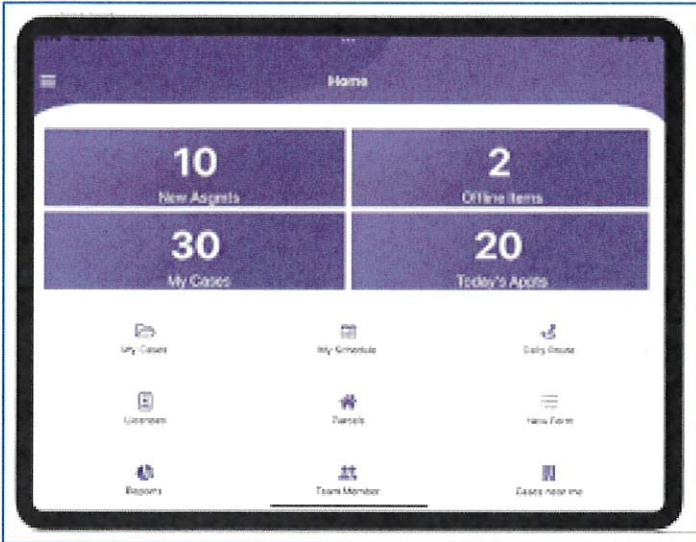
Report Builder

GovBuilt offers a powerful Report Builder feature, catering to the unique needs of each municipality with custom reports. This dynamic tool pulls data from all public activities and submissions, providing comprehensive insights and analytics. Whether municipalities require simple summaries or intricate, in-depth analyses, the Report Builder effortlessly accommodates their preferences. This flexibility empowers municipalities to generate reports that align precisely with their specific objectives and regulatory requirements.



Form Builder

Use our drag-and-drop form creator to create and edit forms for your citizens to self-serve. The ease of use will allow you to make and take online forms in minutes. Take payments, create cases, licenses, create organization-only forms, and much more.



Mobile App

Our cutting-edge mobile app is designed to work while on the go. GovBuilt mobile app will allow your staff to work offline for Android/iOS. When a data connection is available it will auto sync with the GovBuilt Platform. Map and routing capabilities will allow your teams to track your routing to each project. With the GovBuilt mobile app, inspections and approving projects on the go has never been easier.

Code Enforcement Example:

GovBuilt has a few clients using the code enforcement features of our platform. Code Enforcement can start in one of two ways a citizen "Reports a Concern" on the website, or a staff member creates a code enforcement intake. Upon reviewing the concern, a code enforcement case can be started. Allowing staff to complete internal forms, attach form letters, and decide what is shared with the original submitter. We will configure workflows that match your requirements.

A couple clients that use our code enforcement module are City of Saint George, Kansas for multiple violation types from tall grass or nuisance violations to pet issues. Their code enforcement officer uses his cell phone while traveling around the city to quickly complete code violations allowing him to upload pictures and view previous issues. Saline County uses our code enforcement during their environmental services inspections and documents issues. They also use this module to communicate and share findings with real estate agents, title companies, contractors, and citizens.

Your form can be customized to your needs and will allow for multiple types of entry points based on the violation type. Attached is an example of a form that includes a complex fee schedule.

Blight Form

112 West North Pennsylvania Substation

Case # 123456789

Created: 10/26/2023 10:00 AM

Updated: 10/26/2023 10:00 AM

Done: 10/26/2023 10:00 AM

Cancel

Save

Address *

Type of Violation *

Reporter *

Description *

Photo

File Name

Size

Attachments

Copy files to attach (0 items)

Form Letter Details

Form Letter Details

Form Letter Created

File Tracking Number

Date Delivered

Date Returned

Notes: Workflow to create the form letter

9999 Certified Mail Tracking Number

After 7 Days Case will be changed to a status of "Technical"

No Workflow will be triggered with this case

Check Tracking Status

Date Issued

Date Resolved

Date Closed/Posted

No Violations will be triggered with this case

After 7 Days Case will be changed to a status of "Technical"

No Workflow will be triggered with this case

Fee

Admin Fee

File Design

Certified Mail

Publications

Inspection Fee

Demolition Fee

Labor Fee

Equipment Fee

Refuse Removal

Other

Total Cost: \$300

Add other charges as included in invoice
Set a discount code (0.00 applied)

Other Important Features

Agenda

Create, edit, and publish agendas and minutes for your department. Example: Planning and Zoning Committee

Alert

Show notifications on your solution on every page or only in the alert center. Set the severity from informational to critical to graphically display the severity to your citizens.

FAQ

Post answers to the most Frequently Asked Questions (FAQs) you receive, saving your team members' time.

Media Library

Store and organize your photos and other documents to easily post to your citizens.

News

Post news and other informational updates to your citizens. Use our News Widget to place news on any webpage within your citizen portal.

Newsletter

Post a newsletter on your site. Citizens can view the current as well as all old newsletters.

Ordinances & Resolutions

Create a searchable list of your ordinances and resolutions to reduce calls and questions.

Pages

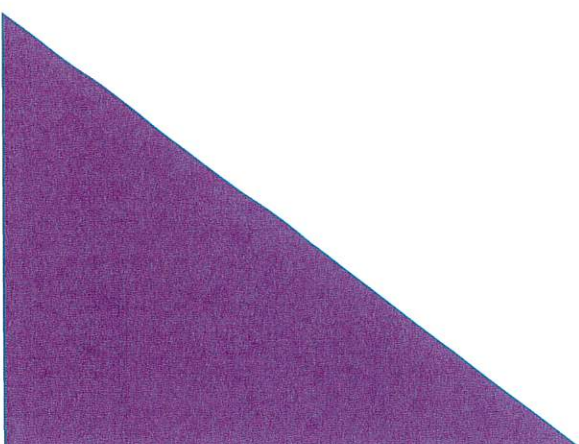
Create custom web pages to post information to your citizens with our drag-and-drop interface. Our Page Module makes it easy for any skill level to create a web page with our built-in widgets. Our HTML and Liquid widgets allow the more advanced users to create custom integrations not possible on other government CMSs.

Search

Our custom Search Module indexes the content on your site to allow citizens to find information without having to call you.

SEO Module

Use the SEO Module to create custom SEO tags for your pages or content. Set Meta Description, Meta Keywords, Canonical link, Meta Robots, and Custom Meta Tags. Create and publish new site maps on your schedule.



Social Media

Create Facebook feed widgets that can be used on any webpage without any code.

Team Members

Create and display detailed contact information for all your staff including their pictures, Facebook, Twitter, and LinkedIn feeds. Organize your team members by department and use our Team Member Widget to show a listing of staff on any web page without having to create duplicate entries.

ADA Section 508 Compliance

GovBuilt provides highly compliant solutions based on WCAG 2.0 A and AA guidelines, which exceeds ADA accessibility requirements. GovBuilt will provide a modern experience while meeting accessibility standards for all users. Each portal will be launched with UserWay's tools <https://userway.org/>

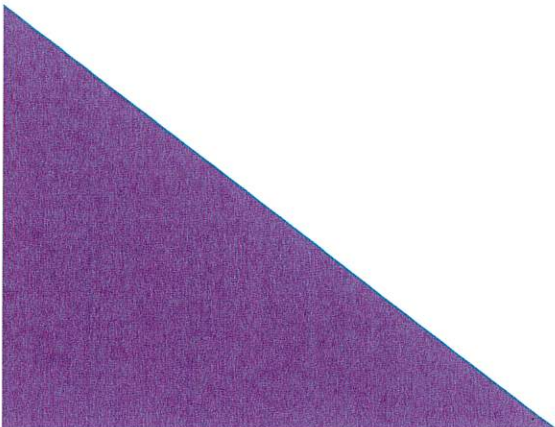
- We will deliver you a citizen portal that meets ADA (Section 508) and WCAG 2.0 A and AA levels.
- Our trainers will teach your staff best practices to keep your content and design elements accessible and up to date with the latest ADA/WCAG standards.
- If a new regulation requires a code change it will be done automatically with no action needed from you.
- GovBuilt continuously updates our best practices and provides regular updates to clients.

Workflows:

GovBuilt is a powerful tool for automating workflows and increasing productivity. With our drag and drop workflow creator, users can easily configure workflow automation without needing to write any code. Our internal workflow module has the capability to tie each workflow to an individual permit type or a group of permit types, providing granular control over the workflow process. In addition, we offer a specific drop-down selection of workflows that allows for an "if this then that" approach, simplifying the workflow creation process even further. To enhance usability, we allow for different levels of access among staff members, ensuring that the right people have access to the right workflows. With GovBuilt, you can streamline your workflow processes and free up time for more important tasks.

Reports:

GovBuilt's reporting capabilities offer the City of Lake Elmo an easy and flexible way to generate unlimited reports. With our simple and advanced report builder, users can quickly create custom reports tailored to their specific needs. In addition, GovBuilt seamlessly integrates with Microsoft Power BI, providing users with a broader range of tools to create interactive and visually appealing reports. For those who prefer working with SQL, our database has a built-in report builder that makes it easy to generate reports directly from the database. Whether it's creating ad-hoc reports or recurring reports, GovBuilt's reporting capabilities offer the city the power and flexibility to get the job done efficiently and effectively.

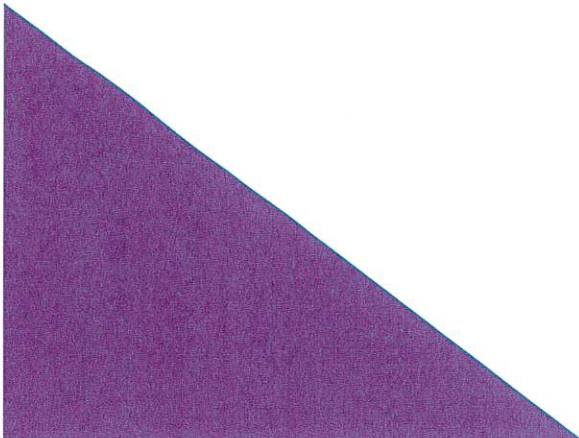


GIS/Parcel Genealogy :

With GovBuilt's parcel genealogy tool, cities can now tie together all cases from all permit types under one location, providing a comprehensive view of all activities associated with a property. This means that users can access and view every single violation letter, permit, and parcel split related to a specific location, creating an unlimited number of parcels and child parcels for easy tracking and monitoring. Furthermore, our integration with Geographic Information System (GIS) allows for seamless data import and multiple layers, making it easy to visualize and understand the data. Whether you're out in the field or back at the office, GovBuilt's parcel genealogy tool provides an efficient and effective way to manage and track property activities.

Integrations :

At GovBuilt, we understand that seamless integration with other software applications is critical to the success of our clients. That's why we have included this integration within our Request for Proposal (RFP). We have worked with major software providers such as Microsoft, Tyler, Laserfiche, Bluebeam, and many others to ensure that our open API system can communicate effectively with your existing applications. However, we do require that you connect us with your provider so that we can establish a dialogue about their APIs. The city can rest assured that they will not need to worry about building or maintaining the integrations as our annual fee includes the management of the integrations included in the scope. With GovBuilt, the integration process is streamlined, hassle-free, and designed to save you time and resources.



Hosting & Security

Uptime

We guarantee an uptime of 99.9% excluding pre-scheduled maintenance hours. We track our uptime using Azure App Insights and can provide detailed reports upon request.

Hosting

The GovBuilt Platform is hosted in the Microsoft Azure Cloud. Azure hosts some of the largest applications in the world in terms of both size and demand. By leveraging the Azure platform, we have full scalability for any growth you may have. Our environment can auto-scale as demand increases, giving you peace of mind.

Security

Our security is updated automatically and monitored by Microsoft AI using Azure Front Door to block and report any suspicious activity. Unlike competitors who only run Vulnerability Assessment quarterly or yearly, your database has a full Vulnerability Assessment run weekly. Microsoft invests more than \$1 billion annually in cybersecurity research and development that you get to leverage.

Advanced Security Option

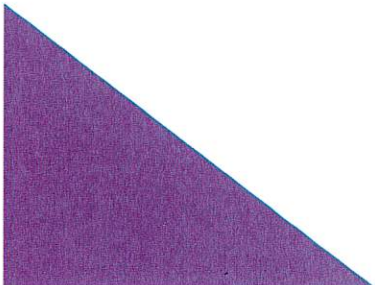
We offer an advanced security package that, on top of industry leading security options included in our base package, gives advanced DDoS protection. Our basic protection will protect you from your everyday DDoS events, while the Azure DDoS protection portal will protect your organization from the largest known attacks in the history of the web. Additional fees apply.

Cyber Security Components & Regulatory Compliance

GovBuilt follows industry leading security standards to ensure protection of your data. We follow PCI, PHI, and HIPPA guidelines. This includes, but is not limited to, having your data double encrypted by encrypting your data at rest and sensitive columns are encrypted inside the database. Your web application only works via HTTPS making sure all data is transferred via HTTPS encryption only. We use Azure Defender's state-of-the-art AI to provide weekly security scans, security alerts, and advanced threat protection for both data and web applications. Our authentication follows PCI standards for password protection and storage to protect your users' login. We also offer an advanced security package to provide even more protection when needed. Azure Compliance Documentation <https://learn.microsoft.com/en-us/azure/compliance/offerings/offering-soc-2>

Disaster Recovery

Sites are monitored 24/7/365 with automated alerts for any emergencies. Our solution is fully redundant with the ability to run in multiple regions. Your data is backed up several times a day and replicated across regions. Azure regions are Iowa for primary and Virginia for backup.



Bandwidth

GovBuilt offers unlimited bandwidth for standard operations (exception for cyberattack).

Updates

Updates happen automatically with little to no down time. You will be notified of any updates that take place out of the normal scheduled window.

Service Level Agreement

We guarantee an uptime of 99.9% excluding pre-scheduled maintenance hours. We track our uptime using Azure App Insights and can provide detailed reports.

System Back-Ups

We make differential backups of your database every 30 minutes, and a full database backup is done daily. For your file storage we do live backups meaning files are backed up automatically. These backups are stored in the Azure cloud where they are securely backed up by Microsoft. To be sure we are safe we do a weekly offsite backup.

Best Practices

Microsoft Azure cloud is the second largest cloud services provider. They host some of the largest and most secure sites in the world. We follow all their best practices including but not limited to weekly data security scans of our databases and servers. We require two factor authentication for anyone that has any access to these servers, we require a separate admin login for each admin. Our admins and permissions are limited to an as needed to limit our risk.

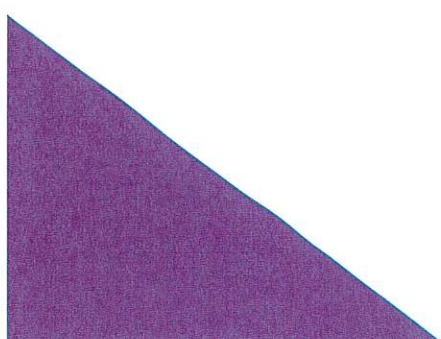
Data Encryption

Our Portals only work via HTTPS. We encrypt our databases and files at rest. We also encrypt sensitive data in columns in the database. We use our Microsoft Security Scans to let us know when there is any data that should be encrypted in the database that is not.

RTO/RPO

Our standard Recovery Point Objective is four hours. However, as mentioned we backup the database every 30 minutes so we do not see a point where we would need to fall back on this.

Our standard RTO is 8 hours. However, being in the Azure cloud our ability to deploy to other regions of the country and world can match anyone in the industry. If a region is down, we can spin up an instance with the same data in another region in less than 10 minutes. The only risk we have is if Microsoft goes down, which if this happens there are tens of millions of businesses and sites down.



User Training

Our Training Approach...

GovBuilt does an instructor lead training. The GovBuilt training methodology is based on training the staff as we go, verse doing one big training at the end of implementation. This allows for a deeper understanding of the solution. With two separate courses Basic and Advanced. GovBuilt can train remotely or in-person depending on your requirements. On the remote training each user will use their own computer. If there is any issue the instructor will remote into their machine to see what is happening.

Most users will only need the basic course which is broken into 2-hour blocks each.

The advanced course is a 4-hour introduction course followed by a 2-hour working session. In the working session we will take an existing or new form and create it as a team. Once complete it will be published online.

Both courses are hands-on using your site. During this time will verify your process is working correctly, help answer questions of your team, and demonstrate the ease-of-use of the system.

Any requested changes will be approved by the project owner prior to implementation.

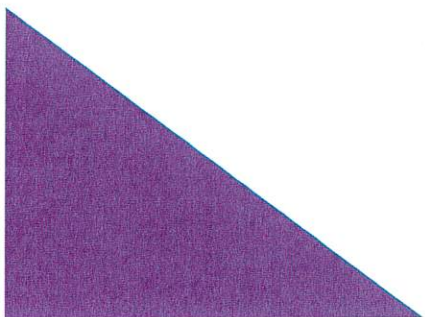
A follow-up is sent with click-through walk-throughs for standard processes. The course is recorded allowing staff to review at any point

Basic Course Outline includes training on the following areas:

- Reset Password
- Process Overview & Alignment
- FAQ
- Finding Cases
- Creating Cases
- Finding Licenses
- Creating Licenses
- Attaching Permits and Form Letters
- Reports & Dashboards
- Adding/Editing Team Members
- Team Members Schedules
- Calendar

Advanced Users:

- Adding/Editing Users
- Adding Alert Banner to the Site
- Adding/Editing Forms including Admin Fields
- Updating Meta Dropdowns
- Update Workflows
- Creating Reports
- Creating Permits and Form Letters
- Creating Licenses



Support

How We Will Support You...

Our support process can start via phone, text, or chat. A support technician will review all low priority items within 4 hours and communicate within 24 hours, medium priority within 1 hr. review and 4 hr. notification, and critical priority is immediate with continuous updates as we know them. After you launch your Project manager will be your support person while we optimize your setup. After the optimizations are completed, we will transition to our standard support team that can help with day-to-day items. If any items need to escalate to an engineer, support will handle this for you. Critical bugs are released within hours, medium between 1 day and 1 week depending on the criticality, and low normally within 2 weeks.

Standard support hours are 7 am –7 pm CST Monday –Friday

Emergency support is available 24/7

Your site is monitored 24/7/365 with technicians standing by if there is an issue

If a support member needs to access your computer, they will do using Zoom.

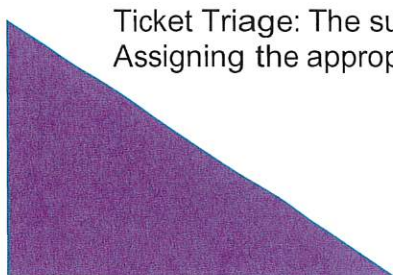
All upgrades are provided free of charge to all our clients. Only charges are for custom programming enhancements that are agreed to by client and GovBuilt before starting. An example would be a new payment merchant integration required by the client.

Any issue can be escalated to Matt Kenney, CTO – Cofounder if the client feels something is not resolved in a timely fashion or to their needs.

Support Triage Process

Ticket Submission: Clients can submit support tickets through a designated channel such as email, phone, or a web-based support portal.

Ticket Triage: The support team should review each ticket to determine the severity level. Assigning the appropriate priority level is crucial in providing timely and effective support.



Priority Levels:

- **Critical:** Any issue that is causing significant business impact or affecting multiple users, resulting in an inability to operate the business as usual. These tickets require immediate attention and should be resolved within 24 hours. If a client receives an error and you do not see the client's banner this means the site is down. Management should be notified immediately!
- **High:** Issues that affect a single user or team but significantly impact their ability to perform their job. These tickets should be resolved within 48 Business hours.
- **Average:** Issues that have a moderate impact on the user's ability to work but are not business critical. These tickets should be resolved within 2 weeks.
- **Low:** Issues that have a minor impact on the user's ability to work or are informational in nature. These tickets should be resolved within the agreed time frame between the client and GovBuilt.

3. Ticket Assignment: Once the priority level has been assigned, the ticket should be assigned to the appropriate team member or team based on their expertise and workload.

4. Ticket Resolution: The assigned team member or team should work to resolve the issue and provide updates to the client as necessary.

5. Ticket Closure: Once the issue has been resolved, the support team should close the ticket and update any relevant documentation or knowledge bases.

6. Customer Feedback: Finally, the support team should seek customer feedback to ensure their satisfaction with the support provided and to identify any areas for improvement.

By following this process, the support team can ensure that tickets are handled in a timely and efficient manner, and that clients receive the appropriate level of support based on the severity of their issue.



Service Level Agreement:

GovBuilt will use commercially reasonable efforts to (a) provide bandwidth sufficient for Customer's use of the Subscription Services provided hereunder and in an applicable Order Form and (b) operate and manage the Subscription Services with a ninety-nine and one-half percent (99.9%) uptime goal (the "Availability SLA"), excluding situations identified as "Excluded" below.

"Excluded" means any outage that results from any of the following:

a. Any maintenance performed by GovBuilt during GovBuilt's standard maintenance windows, as "Scheduled Maintenance").

b. Customer's information content or application programming, or the acts or omissions of Customer or its agents, including, without limitation, the following:

1. Customer's implementation of any significant configuration changes, including changes that lead to a greater than thirty percent (30%) change in a one-week period or greater than fifty percent (50%) change in a one-month period in the number of key objects in the system including but not limited to workflows and business transactions.
2. Any misconfiguration by Customer (as determined in GovBuilt's sole discretion), including, without limitation, configuration errors and bad or unintended usage of the Subscription Services.
3. Force majeure or other circumstances beyond GovBuilt's reasonable control that could not be avoided by its exercise of due care.

c. Failures of the Internet backbone itself and the network by which Customer connects to the Internet backbone or any other network unavailability.

d. Any window of time when Customer agrees that Subscription Services availability/unavailability will not be monitored or counted.

e. Interruptions or delays in providing the Subscription Services resulting from telecommunication or Internet service provider failures.

f. Customer's or any third party's use of the Subscription Services in an unauthorized or unlawful manner.



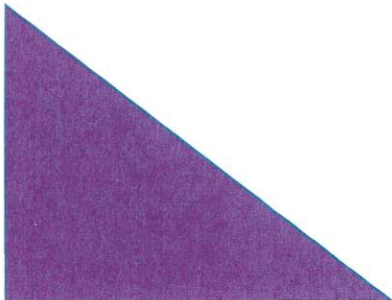
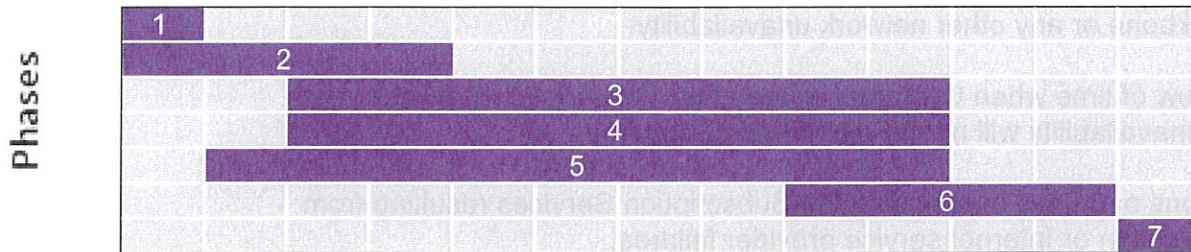


Project Understanding and Implementation Timeline

GovBuilt understands your department's project goals to automate and streamline business processes, provide accessible and transparent government services, and engage with your community. GovBuilt strives to complete our implementation services within **6 to 8 months** with the combined efforts of your staff and GovBuilt's team. However, some projects may add additional time to go-live depending on the timeline of the department.

A simple, seven-step implementation process allows for cross-functional, hands-on training for your staff. Behind the scenes, the GovBuilt team will take your unique processes and bring them to the forefront of GovBuilt's robust platform. The Planning and Zoning Department will benefit from the intelligent forms and refined workflows, which will save all your departments time and money.

Schedule



1. Strategic Planning

The most critical part of implementing a new system is understanding the specific requirements and workflows. The knowledge gained from this critical step will be used to customize the GovBuilt Platform to specifically meet your needs.

GovBuilt Actions/Deliverables:

- Implementation Kickoff Meeting
- Create Integration Meeting Schedule
- Create Data Migration Schedule
- Set up a test environment

City's Actions/Deliverables:

- Provide your project teams' contact information, including job title, email address, and phone number
- Be timely – responses are extremely necessary and missing just one key milestone can put the implementation behind schedule
- Provide access or screen shots for permits or case types
- Provide current workflows as a baseline

2. Mapping:

Concurrently with the consulting sessions, we will work with your team to strategize data migration. We will look at the data and assess the capability to clean, pull, restructure, and move the data to the new platform. This system configuration will include a mapped-out plan of your forms, permits, and inspections for the GovBuilt Platform.

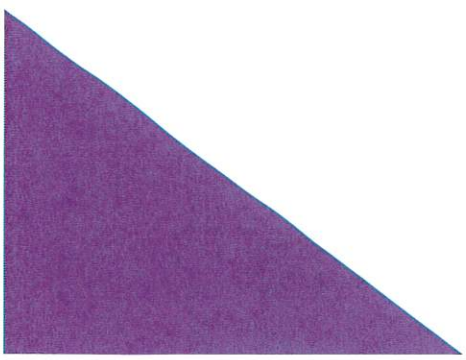
GovBuilt Actions/Deliverables:

- Map current and future workflow processes to be supported by GovBuilt's platform
- Give recommendations in business automation, as necessary

City's Actions/Deliverables:

- Parcel address management
- Contact management
- Inspection scheduling management
- Citizen portal access design input
- User permissions
- Rates or fee schedule
- Inspection check list per type of inspection

GovBuilt's configuration plan will be based on collecting your information within the specified time frame determined in the kick-off meeting.



3. Assembling Workflows

The next step of a GovBuilt implementation is to correctly map your current workflows within the GovBuilt Platform. Sufficient time will be taken to fully whiteboard the process out for each form, from application to inspection. Because the GovBuilt Platform can do all kinds of work, we ensure the process is built to your specifications.



GovBuilt Actions/Deliverables:

- Map current workflows including forms, applications, inspections, etc.

City's Actions/Deliverables:

- Answer questions and give input on the current setup to help assemble workflows correctly

4. Building Forms & Permits

Simultaneously with the mapping of your workflows, the GovBuilt team will configure the system. We'll also work behind the scenes to move initial data and run tests on the first set of workflows.

GovBuilt Actions/Deliverables:

- Configuration all forms and workflows

5. Integrations Start after mapping is completed

In addition, the GovBuilt team will set up the integrations you need to keep your processes running smoothly.

GovBuilt Actions/Deliverables:

- Citizen Portal Design/Layout
Set up integrations

6. Testing and Optimize

All aspects of the GovBuilt Platform are rigorously tested before completion. Working with active data in the system, we'll do checks to see if the software is working as envisioned and make any necessary adjustments.

City's Actions/Deliverables:

- Test the forms and processes by walking through as a citizen to ensure all needs are met
- Validate workflows

GovBuilt Actions/Deliverables:

- Make any necessary adjustments found during testing

7. Training

A final training session will occur over a pre-determined number of days for onsite training sessions. Further, you'll participate in an additional pre-determined number of days post go-live virtual training 30 days after the initial training based off the scope of work.

SOW and Cost – City of Lake Elmo, MN

First Year Services

1. Installation of GovBuilt Platform
2. Citizen Portal Design/Layout
3. Unlimited User Licenses for the City of Lake Elmo
4. 42 Permit/Sub-Type applications and workflows built by GovBuilt
5. GovBuilt will upload a total 2 automated template letters per permit/license type
6. 20 standard reports included however, the city can create as many as they would like.
7. Offline Mobile Inspections
8. Unlimited expansion of forms and workflows built by Lake Elmo after going live
9. Integrations included:
 1. Payment Services Network
 2. Springbrook – Daily CSV batch file export
 3. GIS – Washington County, MN Integration – up to 5 layers
10. Historical Import – Data Migration from Permit Works
 1. Customer to provide CSV file for 22,000 records with no attachments
11. Training – 4 days virtual 1 day of remote training 30 days after launch
12. Permit and Inspection Workflow Consulting – 3 days virtual
13. Support 7 a.m. – 7 p.m. M-F Central Time GovBuilt personnel can be reached via email, chat or phone. Emergency support is included for outside of normal support hours.

Pricing: GovBuilt

	One-Time Implementation	Annual Subscription Including Unlimited Support
Cost MSRP	\$63,500.00	\$25,000.00
MN Marquee Discount	100%	20%
Discounted Cost	\$0.00	\$20,000.00
Total Year 1 Cost		\$20,000.00

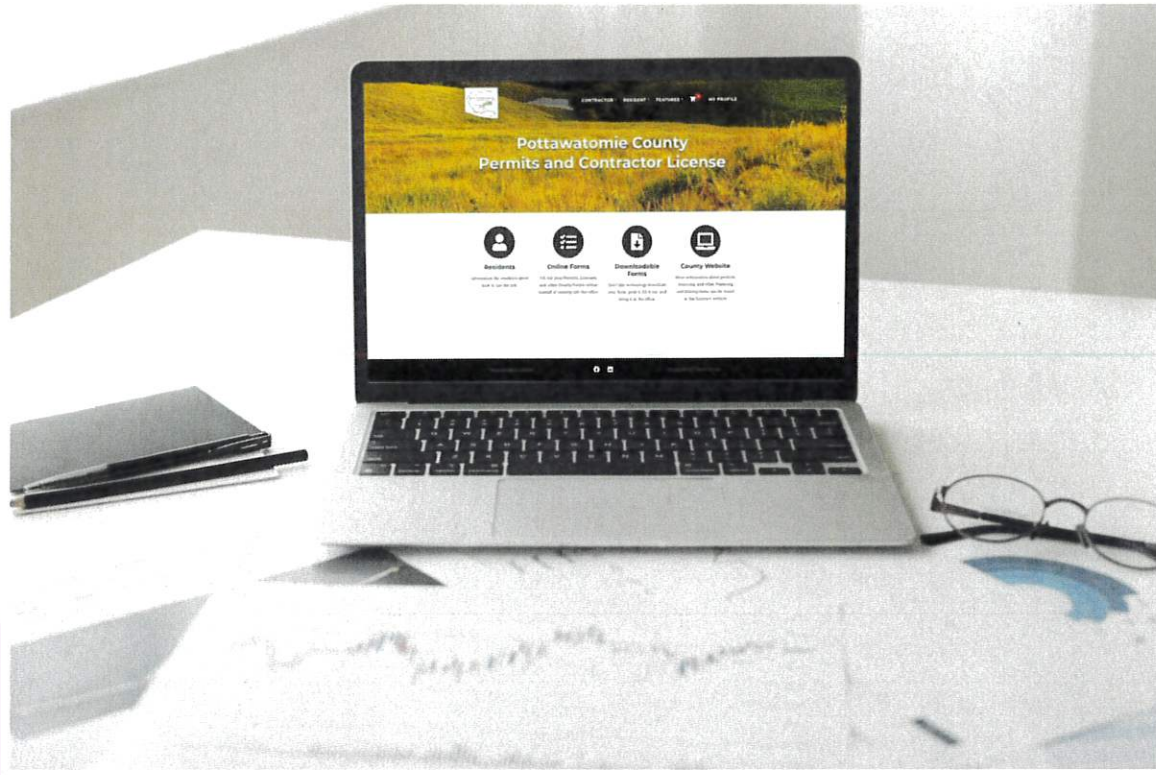
Annual Services are subject to a cumulative annual 5% technology fee increase.
Pricing is good for 90 days.

All changes will be handled as a professional service at \$150/hour unless otherwise agreed to. GovBuilt will notify if any professional service charge is required to complete a task.

Optional Enhancement Pricing:

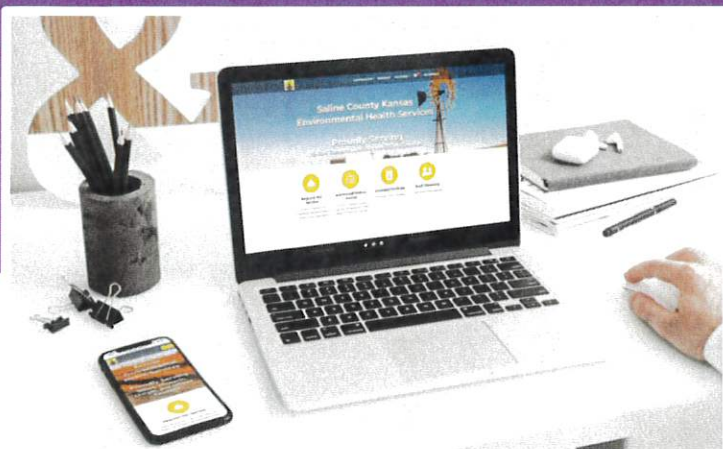
	One-Time Cost	Annual Subscription
Additional forms created by GovBuilt	\$1,000	
Additional for onsite training or consulting per trip – travel cost included	\$3,500	\$0
Per custom report created by GovBuilt	\$2,000	\$0
Microsoft BI integration	\$3,000	\$500
GIS/ESRI integration with a webservice connection with an additional layer	\$2,000	\$0

Background & References

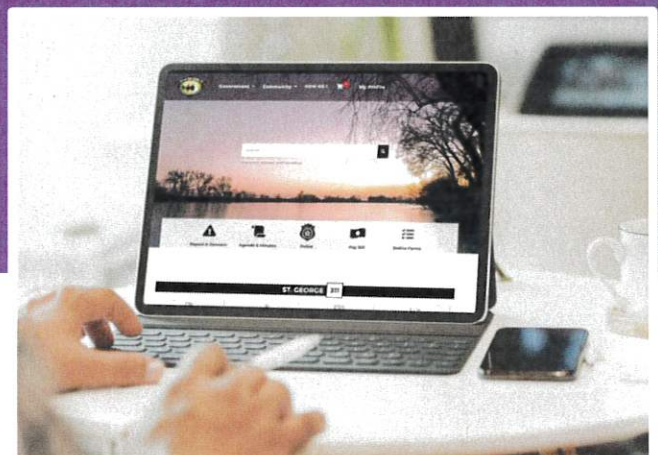


Pottawatomie County, KS
<http://www.pottcounty.govbuilt.com>

Stephan Metzger, County Planner
785-457-3551
Email: Smetzger@pottcounty.org



Saline County, KS
<https://www.salinecountyks.gov/>
Hannah Stambaugh, Deputy County Administrator
785-309-5810 Email: Hannah.Strambaugh@saline.org



Junction City, KS
<https://junctioncity-ks.govbuilt.com/>
Sara Brown, Building Inspector
785-210-2951 Email: Sara.brown@jcks.com