

VILLAGE OF BUFFALO GROVE
AGREEMENT
COMMUNITY DEVELOPMENT PERMITTING, AND INSPECTION SOFTWARE

THIS AGREEMENT is dated as of the 5th day of January, 2021 ("**Agreement**") and is by and between the **VILLAGE OF BUFFALO GROVE**, an Illinois home rule municipal corporation ("**Village**") and the Supplier identified in Subsection 1A below.

IN CONSIDERATION OF the recitals and the mutual covenants and agreements set forth in this Agreement, and pursuant to the Village's statutory and home rule powers, the parties agree as follows:

SECTION 1. SUPPLIER.

A. Engagement of Supplier. The Village desires to engage the Supplier Identified below to provide all necessary professional consulting services and to perform the work in connection with the project identified below:

BS&A Software, Inc. ("Supplier")
14965 Abbey Lane
Bath, MI 48808
Telephone: 517-641-8900
Email:

B. Project Description. The Supplier shall provide a license, install, configure and integrate Community Development Permitting, Village issued License, and Inspection Software (hereinafter, the "Software") either as a standalone system or as part of existing Village system(s). The deliverable described in the preceding sentence shall hereinafter be referred to as the "Solution".

C. Representations of Supplier. The Supplier has submitted to the Village a description of the services to be provided by the Supplier, a copy of which is attached as Exhibit B to this Agreement ("Software/Services"). The Supplier represents that it is financially solvent, has the necessary financial resources, has the unrestricted legal right to provides licenses granted hereunder to the Software and is sufficiently experienced and competent to perform and complete the professional consulting services set forth in Exhibit B in a manner consistent with the standards of professional practice by recognized consulting firms providing services of a similar nature.

SECTION 2. SCOPE OF SERVICES.

- A. **Retention of the Supplier.** The Village retains the Supplier to perform, and the Supplier agrees to perform, the Services.
- B. **Services.** The Supplier shall provide the Services pursuant to the terms and conditions of this Agreement.
- C. **Commencement.** Time of Performance. The Supplier shall commence the Services immediately upon receipt of written notice from the Village that this Agreement has been fully executed by the Parties (the "Commencement Date"). The Supplier shall diligently and continuously prosecute the Services until the completion of the Work.
- D. **Reporting.** The Supplier shall regularly report to the **Deputy Village Manager** ("Manager") or his/her designee, regarding the progress of the Services during the term of this Agreement.

SECTION 3. COMPENSATION AND METHOD OF PAYMENT.

- A. **Agreement Amount.** The total amount billed for the Services during the term of this Agreement shall not exceed the amount identified in the Schedule of Prices section in Exhibit A, unless amended pursuant to Subsection 8A of this Agreement.
- B. **Invoices and Payment.** The Supplier shall be paid as provided in Exhibit A. The Supplier shall submit invoices to the Village in a Village approved format for those portions of the Services performed and completed by the Supplier. The amount billed in any such invoice shall be based on the method of payment set forth in Exhibit A. The Village shall pay to the Supplier the amount billed pursuant to the Illinois Local Government Prompt Payment Act (50 ILCS 505/1 et seq.)
- C. **Records.** The Supplier shall maintain records showing actual time devoted and costs incurred, and shall permit the authorized representative of the Village to inspect and audit all data and records of the Supplier for work done under the Agreement. The records shall be made available to the Village at reasonable times during the Agreement period, and for three years after the termination of the Agreement.
- D. **Claim In Addition To Agreement Amount.** if the Supplier wishes to make a claim for additional compensation as a result of action taken by the Village, the Supplier shall provide written notice to the Village of such claim within 7 calendar days after occurrence of such action as provided by Subsection 8.D. of this Agreement, and no claim for additional compensation shall be valid unless made in accordance with this Subsection. Any changes in this Agreement Amount shall be valid only upon written amendment pursuant to Subsection 8.A. of this Agreement. Regardless of the decision of the Village relative to a claim submitted by the Supplier, the Supplier shall proceed with all of the Services required to complete the project under this Agreement as determined by the Village without interruption.

SECTION 3. COMPENSATION AND METHOD OF PAYMENT (cont.)

- E. **Escalation.** Prices throughout the initial term of the Agreement shall reflect the Supplier's response to the RFP and subsequent negotiations. For subsequent terms, requests for increases of unit prices shall not exceed the CPI-All Urban Consumers.

The Village of Buffalo Grove reserves the right to reject a proposed price increase and terminate the Contract.

- F. **Taxes, Benefits and Royalties.** The Agreement Amount includes all applicable federal, state, and local taxes of every kind and nature applicable to the Services, not including any sales, use or excise tax, as well as all taxes, contributions, and premiums for unemployment insurance, old age or retirement benefits, pensions, annuities, or similar benefits and all costs, royalties and fees arising from the use on, or the incorporation into, the Services, of patented or copyrighted equipment, materials, supplies, tools, appliances, devices, processes, or inventions. Except for any sales, use or excise tax, all claim or right to claim additional compensation by reason of the payment of any such tax, contribution, premium, costs, royalties, or fees is hereby waived and released by Supplier.
- G. **Final Acceptance.** The Services, or, if the Services are to be performed in separate phases, each phase of the Services, shall be considered complete on the date of final written acceptance by the Village of the Services or each phase of the Services, as the case may be, which acceptance shall not be unreasonably withheld or delayed. In the event that a subsequent deliverable causes a prior deliverable to become non-functional or function at a lower level than when that prior deliverable was accepted Supplier shall be obligated to modify the prior deliverable to its prior level of functionality when used in conjunction with the newer deliverable.

SECTION 4. PERSONNEL SUBCONTRACTORS.

- A. **Key Project Personnel.** The Key Project Personnel identified in Exhibit B shall be primarily responsible for carrying out the Services on behalf of the Supplier. The Key Project Personnel shall not be changed without the Village's prior written approval.
- B. **Availability of Personnel.** The Supplier shall provide all personnel necessary to complete the Services including, without limitation, any Key Project Personnel identified in this Agreement. The Supplier shall notify the Village as soon as practicable prior to terminating the employment of, reassigning, or receiving notice of the resignation of, any Key Project Personnel. The Supplier shall have no claim for damages and shall not bill the Village for additional time and materials charges as the result of any portion of the Services, which must be duplicated or redone due to such termination or for any delay, or extension of the Time of Performance as a result of any such termination, reassigning, or resignation.

SECTION 4. PERSONNEL SUBCONTRACTORS (cont.)

- C. **Approval and Use of Subcontractors.** The Supplier shall perform the Services with its own personnel and under the management, supervision, and control of its own organization unless otherwise approved by the Village in writing. All subcontractors and subcontracts used by the Supplier shall be acceptable to, and approved in advance by, the Village. The Village's approval of any subcontractor or subcontract shall not relieve the Supplier of full responsibility and liability for the provision, performance, and completion of the Services as required by the Agreement. All Services performed under any subcontract shall be subject to all of the provisions of this Agreement in the same manner as if performed by employees of the Supplier. For purposes of this Agreement, the term "Supplier" shall be deemed also to refer to all subcontractors of the Supplier, and every subcontract shall include a provision binding the subcontractor to all provisions of this Agreement.
- D. **Removal of Personnel and Subcontractors.** If any personnel or subcontractor fails to perform the Services in a manner satisfactory to the Village, the Supplier shall immediately upon notice from the Village remove and replace such personnel or subcontractor. The Supplier shall have no claim for damages, for compensation in excess of the amount contained in this Agreement of for a delay or extension of the Time of Performance as a result of any such removal or replacement.

SECTION 5. CONFIDENTIAL INFORMATION.

- A. **Confidential Information.** The term "Confidential Information" shall mean information in the possession or under the control of the Village relating to the technical, business or corporate affairs of the Village; Village property; user information, including, without limitation, any information pertaining to usage of the Village's computer system, including and without limitation, any information obtained from server logs or other records of electronic or machine readable form; and the existence of, and terms and conditions of, this Agreement. Village Confidential Information shall not include information that can be demonstrated: (i) to have been rightfully in the possession of the Supplier from a source other than the Village prior to the time of disclosure of said information to the Supplier under this Agreement ("Time of Disclosure"); (ii) to have been in the public domain prior to the Time of Disclosure; (iii) to have become part of the public domain after the Time of Disclosure by a publication or by any other means except an unauthorized act or omission or breach of this Agreement on the part of the Supplier or the Village; or (iv) to have been supplied to the Supplier after the Time of Disclosure without restriction by a third party who is under no obligation to the Village to maintain such information in confidence.
- B. **No Disclosure of Confidential Information by the Supplier.** The Supplier acknowledges that it shall, in performing the Services for the Village under this Agreement, have access to or be directly or indirectly exposed to Confidential Information. The Supplier shall hold confidential all Confidential Information and shall not disclose or use such Confidential Information without express prior written consent of the Village. The Supplier shall use reasonable measures at least as strict as those the Supplier uses to protect its own confidential information. Such measures shall include, without limitation, requiring employees and subcontractors of the Supplier to execute a non-disclosure agreement before obtaining access to Confidential Information.

SECTION 6. WARRANTY; INDEMNIFICATION; INSURANCE

- A. **Warranty of Services.** The Supplier warrants that the Services shall be performed in accordance with the highest standards of professional practice, care, and diligence practiced by recognized consulting firms in performing services of a similar nature in existence at the Time of Performance and that the deliverables will conform in all material respects with their specifications. The warranty expressed shall be in addition to any other warranties expressed in this Agreement, or expressed or implied by law, which are hereby reserved unto the Village.
- B. **Indemnification.** The Supplier shall, without regard to the availability or unavailability of any insurance, either of the Village or the Supplier, indemnify, save harmless, and defend the Village, and its officials, employees, agents, and attorneys against any and all lawsuits, claims, demands, damages, liabilities, losses, and expenses, including reasonable attorneys' fees and administrative expenses, that arise, or may be alleged to have arisen, out of or in connection with, the Supplier's performance of, or failure to perform, the Services or any part thereof, whether or not due or claimed to be due in whole or in part to the active, passive, or concurrent negligence or fault of the Supplier, except to the extent caused by the sole negligence of the Village. Except for breaches of Section 8 A. Disabling Code the Supplier's maximum liability for any claimed damages shall not exceed the terms of the policy of insurance carried by the Supplier as required under the terms of this Agreement.
- C. **Infringement Indemnity.** If the deliverable (including but not limited to any System elements) provided by Supplier (other than items provided by the Village) to provide the System and any related services becomes, or in Supplier's reasonable opinion is likely to become, the subject of an infringement or misappropriation claim or proceeding, then Supplier will promptly notify the Village of such claim or proceeding and at Supplier's expense take the following actions in the following priority order (i.e., Supplier must exercise all commercially reasonable efforts to obtain a higher priority option before resorting to a lower priority option): (i) secure the right to continue using the item; (ii) modify the item to make it non-infringing, provided that such modification will not degrade the performance or quality of the affected component of the Services in any material way; (iii) replace the item with a non-infringing substitute that does not degrade the performance or quality of the affected component of the Services in any material way; or (iv) if the infringement or misappropriation claim or threatened claim is a bona fide claim with a basis in fact, remove the item from the Services and equitably adjust Supplier's charges to adequately reflect such removal. Supplier shall be responsible for all costs and expenses (including costs of building new interfaces) incurred by Supplier or by the Village in connection with the activities contemplated by this Section

SECTION 6. WARRANTY; INDEMNIFICATION; INSURANCE (cont)

- D. **Insurance.** Contemporaneous with the Supplier's execution of this Agreement, the Supplier shall provide certificates and policies of insurance, all with coverages and limits acceptable to the Village, and evidencing at least the minimum insurance coverages and limits as set forth in Exhibit B to this Agreement. For good cause shown, the **Deputy Village** Manager ("Manager") may extend the time for submission of the required policies of insurance upon such terms, and with such assurances of complete and prompt performance, as the Manager may impose in the exercise of his sole discretion. Such certificates and policies shall be in a form acceptable to the Village and from companies with a general rating of A minus, and a financial size category of Class X or better, in Best's Insurance Guide. Such insurance policies shall provide that no change, modification in, or cancellation of, any insurance shall become effective until the expiration of 30 calendar days after written notice thereof shall have been given by the insurance company to the Village. The Supplier shall, at all times during the term of this Agreement, maintain and keep in force, at the Supplier's expense, the insurance coverages provided above, including, without limitation, at all times while correcting any failure to meet the warranty requirements of Subsection 6.A., Warranty of Services, of this Agreement.
- E. **Insurance Requirements** Supplier shall maintain during the entire term of this Agreement, the following insurance coverages
- a. Commercial General Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. The general aggregate shall be \$2,000,000 per project.
 - b. Professional Liability: \$1,000,000 single limit for errors and omissions, professional /malpractice liability.
 - c. Worker's Compensation and Employers' Liability: Worker's Compensation limits of \$1,000,000 and as Employers' Liability limits of \$500,000 per accident or as required by Illinois law.
 - d. Umbrella Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage.
- F. **No Personal Liability.** No elected or appointed official, agent, or employee of the Village shall be personally liable, in law or in contract, to the Supplier as the result of the execution of this Agreement.
- G. **Limitation on Liability and Damages.** Except for breaches of Section 8 A. Disabling Code BSA's entire liability and responsibility for any and all claims, damages, or losses arising from the BSA software products (including but not limited to their use, operation, and/or failure to operate), professional services, maintenance and support, any third-party performance or lack thereof, or otherwise arising out of or relating to this agreement, shall be absolutely limited to direct damages not in excess of the greater of (i) \$203,000; or, (ii) the amount of insurance proceeds actually available without reservation at the time of settlement or judgment to cover the claim(s), damages or losses by the customer under insurance placed or provided pursuant to this agreement. For avoidance of doubt, and without limiting any obligation of any insurer, customer shall not have recourse against BSA for amounts unfunded by insurance proceeds in excess of \$203,000. Notwithstanding any provision contained herein, BSA shall not be liable for any indirect, consequential, special, incidental, or contingent damages or expenses, whether in contract, tort (including negligence) or otherwise, arising in any way out of this agreement, BSA software products, any third-party performance, or lack thereof, or BSA's performance, or lack thereof, under this agreement, including without limiting the generality of the foregoing, loss of revenue, profit, or use. To the extent that applicable law does not permit the limitations set forth herein, the liability and damages shall be limited and restricted to the extent permitted by law.

- H. **Limited Software Warranty.** Supplier warrants and represents for a period of one (10) year from the installation of Supplier's software product that ; (i) such Supplier software product will perform substantially in the same manner as official demonstration versions and in accordance with Supplier's authorized online tutorials and videos that may have been made available as part of the sales and negotiation process leading up to this agreement; and (ii) Supplier's software product shall conform to the documentation and be free of material defects in workmanship and materials. Any claim under this Limited Software Warranty must be made within one (1) year from the installation of the applicable Supplier software product. Village's exclusive remedy in the event of a breach of this warranty shall be to have Supplier use reasonable efforts to repair or replace the non-conforming Supplier software product so as to render it conforming to the warranty, or in the event that it is not possible to render it conforming with reasonable efforts, to receive a refund of the amount paid for the Supplier software product. The foregoing Limited Software Warranty is in lieu of all other representations or warranties relating in any way to the Supplier software products, including, but not limited to, their features, attributes, functionality and performance. The foregoing Limited Software Warranty is in lieu of all such representation or warranties whether express or implied, including, but not limited to, any implied warranties or representations of merchantability, merchantable quality and fitness for a particular purpose and those arising by statute or otherwise in law or from the course of dealing or usage of trade. Supplier does not represent or warrant that the Supplier software products will meet any or all of Village's particular requirements, that the operation of the Supplier software will operate error-free or uninterrupted, or that all programming errors in the Supplier software product(s) can be found in order to be corrected.

SECTION 7. TERM and TERMINATION

- A. **Termination.** Notwithstanding any other provision hereof, the Village may terminate this Agreement, without cause, at any time upon 15 calendar days prior written notice to the Supplier. In the event that this Agreement is so terminated, the Supplier shall be paid for Services actually performed and reimbursable expenses actually incurred, if any, prior to termination, not exceeding the value of the Services completed as determined as provided in Exhibit B.
- B. **Term.** The Time of Performance of this Agreement, unless terminated pursuant to the terms of this Agreement, shall be for 24 months from the date of Final Acceptance. The Village shall have the right to extend this agreement for subsequent 12 month terms. At the end of any Term the Village reserves the right to extend this contract for a period of up to one hundred and eighty (180) calendar days for the purpose of securing a new agreement.
- C. **Implementation Schedule** The Supplier shall have completed all work required to implement the Solution and the Software system shall be accepted by the Deputy Village Manager, provided that acceptance by the Deputy Village Manager shall not be unreasonably delayed, On or before **October 1, 2021**.

SECTION 7. TERM and TERMINATION(cont.)

- D. **Default.** if it should appear at any time that the Supplier has failed or refused to prosecute, or has delayed in the prosecution of, the Services with diligence at a rate that assures completion of the Services in full compliance with the requirements of this Agreement, or has otherwise failed, refused, or delayed to perform or satisfy the Services or any other requirement of this Agreement ("Event of Default"), and fails to cure any such Event of Default within fourteen (14) calendar days after the Supplier's receipt of written notice of such Event of Default from the Village, then the Village shall have the right, without prejudice to any other remedies provided by law or equity, to pursue any one or more of the following remedies:

1. **Cure by Supplier.** The Village may require the Supplier, within a reasonable time, to complete or correct all or any part of the Services that are the subject of the Event of Default; and to take any or all other action necessary to bring the Supplier and the Services into compliance with this Agreement.
2. **Termination of Agreement by Village.** The Village may terminate this Agreement without liability for further payment of amounts due or to become due under this Agreement.
3. **Withholding of Payment by Village.** The Village may withhold from any payment, whether or not previously approved, or may recover from the Supplier, any and all costs, including attorneys' fees and administrative expenses, incurred by the Village as the result of any Event of Default by the Supplier or as a result of actions taken by the Village in response to any Event of Default by the Supplier.

SECTION 8. AGREEMENT GENERAL PROVISIONS

- A. **Disabling Code** Supplier covenants, warrants and represents that it has taken all reasonable steps to test any software licensed or developed hereunder (including software modifications) for Disabling Code (as defined below) and that the software is and shall be free of Disabling Code as of the date of delivery by the Supplier, and that the Supplier shall continue to take such steps with respect to future enhancements or modifications to the software. The Supplier shall not invoke any Disabling Code on any of the Village of Buffalo Grove's systems. The term "Disabling Code" means computer instructions, features or functions that may permit the Supplier or a third party to, or may automatically: (a) alter, destroy or inhibit the software and/or Village of Buffalo Grove's processing environment; (b) erase, destroy, corrupt or modify any data, programs, materials or information used by Village of Buffalo Grove or store any data, programs, materials or information on Village of Buffalo Grove's computers without the consent of Village of Buffalo Grove; (c) discontinue Village of Buffalo Grove's effective use of the software; or (d) bypass any internal or external software security measure to obtain access to any hardware or software of Village of Buffalo Grove without the consent or knowledge of Village of Buffalo Grove, including, but not limited to, other programs' data storage and computer libraries. Disabling Code includes, but is not limited to, programs that self-replicate without manual intervention, instructions programmed to activate at a predetermined time or upon a specified event, and/or programs purporting to do a meaningful function but designed for a different function. The Supplier further covenants, warrants and represents that it shall maintain a master copy of each version of the software free and clear of any Disabling Code. Upon Village of Buffalo Grove's request, the Supplier agrees to make such master copy available to Village of Buffalo Grove, with appropriate provisions for security thereof, for comparison with, and if necessary, correction by the Supplier of Village of Buffalo Grove's copy of the software.
- B. **Virus Protection** To the extent that any computer equipment is used by the Supplier in conjunction with the Services and the Supplier provides software or equipment to Village of Buffalo Grove, the Supplier must use up-to-date anti-virus software on all such equipment and systems, which shall constitute commercially reasonable efforts to deliver all software and equipment virus free. As used in the preceding sentence, "up-to-date anti-virus software" shall mean that the Supplier uses virus definition files made available by the anti-virus software publisher no more than seven (7) calendar days prior to the date of the complained of incident. The Supplier must have approved anti-virus protection software and update virus definition files on a weekly basis, unless a new or variant virus or malicious code is identified by Village of Buffalo Grove and communicated to the Supplier and in such case, the updates will occur daily. All storage media will be scanned on a daily basis or files will be scanned on a real time basis by virus protection software as those files are accessed, and any infected files will be immediately deleted. The Supplier will be responsible for making any and all configuration changes or purchases, which may be required, based on the above referenced Village of Buffalo Grove evaluation. It is the responsibility of the Supplier to ensure timely updates, patches, etc., and to ensure their software and protection remains current (as specified above). With respect to software deliverables, immediately before delivering them to Village of Buffalo Grove, the Supplier will scan such deliverables for viruses with the most recent virus definition files available from the anti-virus software publisher. If the Supplier fails to perform any obligation set forth in this section and if as a result, the software deliverable or interfacing equipment introduces a virus into Village of Buffalo Grove's system(s), the Supplier will be responsible for any costs in removing the virus from the affected system(s), in addition to being liable for other damages resulting from such introduction.

SECTION 8. AGREEMENT GENERAL PROVISIONS (cont.)

C. Maintenance and Support

The Supplier's Software, including all features and modular applications associated with the Software, must have qualified and available support included as a part of ongoing services to maintain the Software, using guidelines, structures, and materials meeting the following criteria:

1. **Online Training Videos.** An online repository of training videos for the purposes of fully training new staff members or retraining existing IT staff members at no additional cost.
2. **Support.** The Supplier shall provide access to live support available via e-mail or phone during Supplier's normal business hours. The support team must be fluent in the functionality and uses of both the Software system's features and associate applications and modules. Responses to critical issues shall be as defined in Maintenance and Support SLA section of this document.
3. **Support Materials.** 24/7 access to support materials including, but not limited to: online training manuals, support FAQs, customer support forums, instructional videos, informational newsletters, informational and support-driven webinars (live and archived), request forms, online education courses and support-related updates through common social networking mediums at no additional cost.

The Supplier must commit to regular maintenance and updating of the Software and associated applications for the purposes of keeping the existing software up-to- date as well as introducing new functionality and applications. Supplier shall commit to and provide information on:

4. **Development Process.** A process dedicated to reviewing new technologies and implementing development projects in order to provide a more robust software package with additional features and applications.
5. **Software Improvements.** Regular maintenance of the Software to improve existing functionality and, when appropriate, take the Village's requests into consideration.
6. **New Features.** Rolling upgrades of the solution that strengthen and update the Software's functionality and associated applications.
7. **Software Maintenance Agreement.** In all submitted proposals, Suppliers shall be able to produce a Software Maintenance Agreement that details guarantees of upgrades and the dedicated process for improving the software purchased by the Village. The terms of such Software Maintenance Agreement shall be subordinate to the terms of this Agreement.

Annual license, maintenance and support costs shall not be charged by the Supplier until final acceptance by the village.

8. With respect to Errors following the expiration of the Limited Software Warranty, Supplier's sole obligation and Village's sole remedy are set forth in this section. Subject to Village's compliance with the terms of the Agreement and continued purchase of Maintenance and Support, Supplier shall use commercially reasonable efforts, commensurate with the severity level, to achieve its support response and resolution targets with respect to Errors as set forth in the Support Service Level Agreement. An "Error" means a verifiable and reproducible failure of a Supplier software

product to operate in accordance with the Documentation under conditions of normal use and where the Error is directly attributable to the Supplier software product(s) as updated with current modifications. If the Village modifies the Supplier software products without Supplier's written consent, Supplier's obligation to provide support services on the Supplier software products will be void.

9. Support does not include the following: (i) installation or implementation of the Supplier software products; (ii) onsite training/support, remote training, application design, and other consulting services; (iii) support of an operating system, hardware, or support outside of Supplier's normal business hours; (iv) support or support time due to a cause external to the Supplier software products adversely affecting their operability or serviceability, which shall include but not be limited to water, fire, wind, lightning, other natural calamities, transportation, misuse, abuse, or neglect; (v) repair of the Supplier software products modified in any way other than modifications made by Supplier or its agents; (vi) support of any other third-party vendors' software, such as operating system software, network software, database managers, word processors, etc.; and (vii) support of the Supplier software products that have not incorporated current Modifications. All such excluded Maintenance and Support services performed by Supplier at Village's request shall be invoiced to Village on a time and materials basis, plus reasonable expenses associated therewith.
10. Notwithstanding anything to the contrary, in order to maintain the integrity and proper operation of the software, Village agrees to use commercially reasonable efforts to implement, in the manner instructed by Supplier, all Modifications in a timely manner. Village's failure to implement any Modifications may limit or restrict the ability of Village to implement future Modifications. Village shall provide prompt notice of any Errors discovered by Village, or otherwise brought to the attention of the Village. Proper notice may include, without limitation, prompt telephonic or written (either via e-mail or postal mail) notice to Supplier of any purported Error. If requested by Supplier, Village agrees to provide written documentation of Errors to substantiate those Errors and to otherwise assist Supplier in the detection and correction of said Errors. Supplier will use its commercially reasonable judgment to determine if an Error exists.
11. Village acknowledges and agrees that Supplier and product vendors may require online access to the Supplier's system in order for Supplier to provide Maintenance and Support services hereunder. Accordingly, Village shall provide a connection to the Internet to facilitate Supplier's remote access to the Supplier software product. Supplier shall provide remote connection software, which may require installation of a software component on a workstation or server computer.

SECTION 8. AGREEMENT GENERAL PROVISIONS (cont.)

- D. **Support Service Level Agreement** – In all submitted proposals, Suppliers shall provide a Service Level Agreement that details guarantees of customer support as well as a service escalation process that shall at a minimum provide a level of support as described below. System shall be understood to mean the software provided by the Supplier, any modifications made to the software by the Supplier, servers run by the Supplier or Supplier’s sub-contractor.

Supplier shall respond to Village initiated problems in accordance with the following

Supplier’s standard hours for support are from 8:30 a.m. to 6:00 p.m. (EST), Monday through Thursday, and 8:30a.m. to 5:00 p.m. (EST) on Friday, excluding holidays.

The Village can lodge a support request in three ways: (i) Contact Customer Support option located within the Help menu of all of our applications (ii) our toll-free support line (1-855-BSA-SOFT) or (iii) via email.

Supplier targets less than thirty (30) minutes for initial response (“Initial Response Target”).

Customer service requests fall into four main categories:

- a) **Technical.** Questions or usage issues relating to I.T. functionality, future hardware purchases, and configuration. SUPPLIER tries to resolve these issues within SUPPLIER’s Initial Response Target or as soon thereafter as reasonably possible.
- b) **Questions/Support.** General questions regarding functionality, use, and setup of the applications. SUPPLIER tries to resolve these issues within SUPPLIER’s Initial Response Target or as soon thereafter as reasonably possible.
- c) **Requests.** Customer requests for future enhancements to the applications. Key product management personnel meet with development staff on a regular basis to discuss the desirability and priority of such requests. SUPPLIER tries to resolve these issues within SUPPLIER’s Initial Response Target or as soon thereafter as reasonably possible.
- d) **Issues/Bugs.** Errors fall into three (3) subcategories:
 - i. **Critical.** Cases where an Error has rendered the application or a material component unusable or not usable without substantial inconvenience, causing material and detrimental consequences to business -- with no viable Customer workaround or alternative. The targeted resolution time for critical issues is within one (1) day.
 - ii. **Moderate.** Cases where an Error causes inconvenience and added burden, but the application is still usable by Customer. The targeted resolution time for all moderate issues is within two (2) weeks, which is within our standard update cycle.
 - iii. **Minimal.** Cases that are mostly cosmetic in nature, and do not impede functionality in any significant way. These issues are assigned a priority level at our regular meetings, and resolution times are based on the specified priority.

Remote Support Process

Some support calls may require further analysis of Customer’s database or setup to diagnose a problem or to assist Customer with a question. SUPPLIER’s remote support tools share Customer’s desktop via the Internet to provide Customer with virtual on-site support. SUPPLIER’s support team is able to quickly connect remotely to Customer’s desktop and view its setup, diagnose problems, or assist Customer with screen navigation.

SECTION 8. AGREEMENT GENERAL PROVISIONS (cont.)

Escalation Options and Procedures

Contacting the Project Manager assigned by the Supplier is the preferred way to initiate the escalation process should a problem arise that the Village feels is not being given the appropriate attention or priority. The Project Manager is responsible for and has access to all resources available in providing a resolution. A solution in these circumstances may be a temporary one that gets the Village going again as soon as possible while a more permanent solution is identified.

- E. **License**. Supplier hereby grants to the Village, for the Term of this Agreement and any successor Terms, a non-exclusive, non-transferable, non-assignable and royalty-free (other than for the license and support fees set forth in this Agreement) license to use the Software (which includes the right to use any updates, revisions, new versions or any other code provided under the Supplier's Support obligations to the Village) in accordance with the terms of this Agreement. These license rights shall include the right of the Village (i) to install the Software on hardware owned by the Village, leased by the Village or provided to the Village under a services agreement with a third party (ii) employ a third party service provider, either directly or indirectly, to operate and maintain its information technology environment, install and maintain the Software and to serve as the Village's interface to Supplier for any Software support or Service Level Agreement matters, (iii) allow an unlimited number of third parties (collectively "Customers") to access the Software via a Web Interface without the requirement that any Customer enter into a license agreement with Supplier or pay any fee of any sort to Supplier; or (iv) allow any third party to access the Software as required by the provisions of the laws of the United States of America or the State of Illinois. The Village will not sublicense, modify, adapt, translate, or otherwise transfer, reverse compile, disassemble or otherwise reverse engineer Supplier's software products or any portion thereof without prior written consent of Supplier. Without limiting the foregoing, the Supplier's software products may not be modified by anyone other than the Supplier. If the Village modifies, or allows a third-party to modify the Supplier software products without Supplier's prior written consent, any Supplier obligation to provide support services on, and the warranty for, the Supplier software products will be void. All rights not expressly granted are reserved.

F. Transition to Supplier Product

Availability. In the event the Supplier makes available successor software products (including but not limited to software products based on a new technical architecture, a change of platform such as from server based to cloud based) ("New Supplier Product") with substantially similar functionality to the Supplier software products licensed by the Village within four (4) years of the Acceptance Date, Village may transfer to the New Supplier Product. Such transfer must be committed to by the Village by the earlier of the expiration date of the four (4) year period, or eighteen (18) months after the release of the New Supplier Product and the Village shall commit to a three(3) year or longer term agreement with the Supplier.

1. **Discounted Cost**. Supplier shall provide a credit for transitioning to New Supplier Product, within the earlier of the four (4) year period after the Acceptance Date, or eighteen (18) months after the release of the New Supplier Product. Supplier shall provide a credit to the Village of sixty (60) percent of the cost of the Applications (identified as Item A: Software from the Schedule of Prices in Exhibit A) as amended by any Change Orders if the Village commits to said transfer within one (1) year of the Acceptance Date. Supplier shall provide a credit to the Village of thirty (30) percent of the cost of the Applications (identified as Item A: Software from the Schedule of Prices in Exhibit A) as amended by any Change Orders if the Village commits to said transfer more than one (1) year after the Acceptance Date, but less than two (2) years

SECTION 8. AGREEMENT GENERAL PROVISIONS (cont.)

after the Acceptance Date. Supplier shall provide a credit to the Village of twenty (20) percent of the cost of the Applications (identified as Item A: Software from the Schedule of Prices in Exhibit A) as amended by any Change Orders if the Village commits to said transfer more than two (2) years after the Acceptance Date, but less than four (4) years after the Acceptance Date.

2. **Period of Provision.** Supplier shall provide such Transition Assistance Services to the Village commencing upon a binding commitment by the Village to implement the New Supplier Product [delivery of transition project schedule to the Village and notice from the Village up to ninety (90) calendar days prior to the cutover to New Supplier Product] and continuing [for up to ninety (90) calendar days following the effective date of the cutover to] until the cutover to the New Supplier Product has successfully met all of the Transition Criteria as set forth below (scheduled cutover may be extended pursuant to the provisions of this Agreement

3. **Performance.** The extent the Village requests Transition Assistance Services, such Transition Assistance Services shall be provided subject to and in accordance with the terms and conditions of this Agreement. Supplier shall perform the Transition Assistance Services with at least the same degree of accuracy, quality, completeness, timeliness, responsiveness and resource efficiency as it provided and was required to provide the same or similar Services during the Term. The quality and level of performance of the Transition Assistance Services provided by Supplier following the expiration or termination of the Term as to all or part of the Services or Supplier's receipt of a notice of termination or non-renewal shall continue to meet or exceed the Service Levels and shall not be degraded or deficient in any respect.

4. **Scope of Transition Assistance Service.** As part of the Transition Assistance Services, Supplier will provide any and all reasonable assistance requested by the Village to allow, among other things:
 - a) The operation of the software and services provide here under to continue without interruption or adverse effect; and

 - b) Supplier shall (i) assist the Village in developing a written transition plan for the transition to the New Supplier Product, which plan shall include the planning necessary to effect the transition without material disruption of The Village's ability to use the New Supplier Product or result in a loss of data during the transition, (ii) assist in the execution of a parallel operation, data migration and testing process until the transition to the New Supplier Product has been successfully completed, and, (iii) create and provide copies of the Village data in the format and on the media reasonably requested by the Village.

SECTION 8. AGREEMENT GENERAL PROVISIONS (cont.)

G. Termination Assistance Services.

Availability. As part of the Services, and for the hourly rate(s) set forth in the Schedule of Prices, adjusted by the cumulative change in Consumers Price Index (CPI-U for all Urban Consumers) between the year of contract execution, and the year said services are requested for such services Supplier shall provide to the Village the Termination Assistance Services described herein (Termination Assistance Services).

1. **Period of Provision.** Supplier shall provide such Termination Assistance Services to the Village or its designated successor supplier(s) (commencing upon notice from the Village up to one hundred and eighty (180) calendar days prior to the expiration of the Term and continuing for up to one hundred and eighty (180) calendar days following the effective date of the expiration of the Term (as such Term may be extended pursuant to the provisions of this Agreement).
2. **Firm Commitment.** Supplier shall provide Termination Assistance Services to The Village's or its designated successor supplier(s) regardless of the reason for the expiration or termination of the Term; provided, if this Agreement is terminated by Supplier for failure to pay undisputed amounts, Supplier may require payment by the Village in advance for Termination Assistance Services to be provided or performed under this section.
3. **Performance.** To the extent The Village's requests Termination Assistance Services, such Termination Assistance Services shall be provided subject to and in accordance with the terms and conditions of this Agreement. Supplier shall perform the Termination Assistance Services with at least the same degree of accuracy, quality, completeness, timeliness, responsiveness and resource efficiency as it provided and was required to provide the same or similar Services during the Term. The quality and level of performance of the Termination Assistance Services provided by Supplier following the expiration or termination of the Term as to all or part of the Services or Supplier's receipt of a notice of termination or non-renewal shall continue to meet or exceed the Service Levels and shall not be degraded or deficient in any respect.
4. **Scope of Termination Assistance Service.** As part of the Termination Assistance Services, Supplier will timely transfer the control and responsibility for all information technology functions and Services previously performed by or for Supplier to the Village and/or its designated successor supplier(s) by the execution of any documents reasonably necessary to effect such transfers. Additionally, Supplier shall provide any and all reasonable assistance requested by the Village to allow, among other things:
 - c) the Services to continue without interruption or adverse effect; and
 - d) the orderly transfer of the Services to the Village and/or its designated successor supplier(s).

Supplier shall (i) assist the Village or its designated successor supplier(s) in developing a written transition plan for the transition of the Services to the Village or its designated successor supplier(s), which plan shall include the planning necessary to effect the transition, (ii) assist in the execution of a parallel operation, data migration and testing process until the transition to the Village or its designated successor supplier(s) has been successfully completed, and, (iii) create and provide copies of the Village data in the format and on the media reasonably requested by the Village.

SECTION 9. GENERAL PROVISIONS.

- A. **Amendment.** No amendment or modification to this Agreement shall be effective unless and until such amendment or modification is in writing, properly approved in accordance with applicable procedures, and executed.
- B. **Assignment.** This Agreement may not be assigned by the Village or by the Supplier without the prior written consent of the other party.
- C. **Calendar Days and Time.** Unless otherwise provided in this Contract, any reference in this Contract to “day” or “days” shall mean calendar days and not business days. If the date for giving of any notice required to be given, or the performance of any obligation, under this Contract falls on a Saturday, Sunday or federal holiday, then the notice or obligation may be given or performed on the next business day after that Saturday, Sunday or federal holiday.
- D. **Binding Effect.** The terms of this Agreement shall bind and inure to the benefit of the Parties hereto and their agents, successors, and assigns.
- E. **Compliance with Laws and Grants.** Supplier shall give all notices, pay all fees, and take all other action that may be necessary to ensure that the Services are provided, performed, and completed in accordance with all required governmental permits, licenses, or other approvals and authorizations that may be required in connection with providing, performing, and completing the Services, and with all applicable statutes, ordinances, rules, and regulations, including without limitation the Fair Labor Standards Act; any statutes regarding qualification to do business; any statutes prohibiting discrimination because of, or requiring affirmative action based on, race, creed, color, national origin, age, sex, or other prohibited classification, including, without limitation, the Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101 et seq., and the Illinois Human Rights Act, 775 ILCS 5/1-101 et seq. Supplier shall also comply with all conditions of any federal, state, or local grant received by Owner or Supplier with respect to this Contract or the Services.

Supplier shall be solely liable for any fines or civil penalties that are imposed by any governmental or quasi-governmental agency or body that may arise, or be alleged to have arisen, out of or in connection with Supplier's, or its subcontractors', performance of, or failure to perform, the Services or any part thereof.

Every provision of law required by law to be inserted into this Contract shall be deemed to be inserted herein.

- F. **No Additional Obligation.** The Parties acknowledge and agree that the Village is under no obligation under this Agreement or otherwise to negotiate or enter into any other or additional contracts or agreements with the Supplier or with any Supplier solicited or recommended by the Supplier.

SECTION 9. GENERAL PROVISIONS (cont)

- G. **Village Board Authority.** Notwithstanding any provision of this Agreement, any negotiations or agreements with, or representations by the Supplier to Suppliers shall be subject to the approval of the Village Board of Trustees. The Village shall not be liable to any Supplier or other third party for any agreements made by the Supplier, purportedly on behalf of the Village, without the knowledge and approval of the Village Board of Trustees.
- H. **Mutual Cooperation.** The Village agrees to cooperate with the Supplier in the performance of the Services, including meeting with the Supplier and providing the Supplier with such non-confidential information that the Village may have that may be relevant and helpful to the Supplier's performance of the Services. The Supplier agrees to cooperate with the Village in the performance of the Services to complete the Work and with any other Suppliers engaged by the Village.
- I. **Ownership.** Designs, drawings, plans, specifications, photos, reports, information, observations, calculations, notes, and any other documents, data, or information, in any form, prepared, collected, or received by the Supplier in connection with any or all of the Services to be performed under this Agreement ("Documents") shall be and remain the exclusive property of the Village. At the Village's request, or upon termination of this Agreement, the Supplier shall cause the Documents to be promptly delivered to the Village.
- J. **Freedom of Information.** Supplier agrees to furnish all documentation related to this Agreement and any documentation related to the Village required under an Illinois Freedom of Information Act (ILCS 140/1 et. seq.) ("FOIA") request within five (5) calendar days after Village issues notice of such request to Contractor. Contractor agrees to defend, indemnify and hold harmless the Village, and agrees to pay all reasonable costs connected therewith (including, but not limited to reasonable attorney's and witness fees, filing fees and any other expenses) for the Village to defend any and all causes, actions, causes of action, disputes, prosecutions, or conflicts arising from Supplier's, actual or alleged violation of the FOIA or Supplier's failure to furnish all documentation related to a request within five (5) calendar days after Village issues notice of a request. Furthermore, should Supplier request that Village utilize a lawful exemption under FOIA in relation to any FOIA request thereby denying that request, Supplier agrees to pay all costs connected therewith (such as reasonable attorneys' and witness fees, filing fees and any other expenses) to defend the denial of the request. The defense shall include, but not be limited to, challenged or appealed denials of FOIA requests to either the Illinois Attorney General or a court of competent jurisdiction. Supplier agrees to defend, indemnify and hold harmless the Village, and agrees to pay all costs connected therewith (such as reasonable attorneys' and witness fees, filing fees and any other expenses) to defend any denial of a FOIA request by Supplier's request to utilize a lawful exemption to the Village.
- K. **News Releases.** The Supplier shall not issue any news releases or other public statements regarding the Services without prior approval from the Manager.

SECTION 9. GENERAL PROVISIONS (cont)

- L. **Notice.** Any notice or communication required or permitted to be given under this Agreement shall be in writing and shall be delivered (i) personally, (ii) by a reputable overnight courier, (iii) by certified mail and deposited in the U.S. Mail, postage prepaid, (iv) by facsimile, or (v) by electronic Internet mail ("e-mail"). Facsimile notices shall be deemed valid only to the extent that they are (a) actually received by the individual to whom addressed and (b) followed by delivery of actual notice in the manner described in either (i), (ii), or (iii) above within three business days thereafter at the appropriate address set forth below. E-mail notices shall be deemed valid and received by the addressee thereof when delivered by e-mail and (a) opened by the recipient on a business day at the address set forth below, and (b) followed by delivery of actual notice in the manner described in either (i), (ii) or (iii) above within three business days thereafter at the appropriate address set forth below. Unless otherwise expressly provided in this Agreement, notices shall be deemed received upon the earlier of (a) actual receipt; (b) one business day after deposit with an overnight courier as evidenced by a receipt of deposit; or (c) three business days following deposit in the U.S. mail. By notice complying with the requirements of this Subsection, each Party shall have the right to change the address or the addressee, or both, for all future notices and communications to such party, but no notice of a change of addressee or address shall be effective until actually received.

Notices and communications to the Village shall be addressed to, and delivered at, the following address:

Village of Buffalo Grove. ("Village")
50 Raupp Blvd
Buffalo Grove, IL 60089
Attention: Deputy Village Manager
Email: CStilling@vbg.org

With a copy to
Patrick Brankin, pbrankin@schainbanks.com
Brett Robinson, brobinson@vbg.org

Notices and communications to the Supplier shall be addressed to, and delivered at, the following address:

BS&A Software, Inc. ("Supplier")
14965 Abbey Lane
Bath, MI 48808
Telephone: 517-641-8900
Attention: Contract Manager
Email:

SECTION 9. GENERAL PROVISIONS (cont)

- M. **Third Party Beneficiary.** No claim as a third party beneficiary under this Agreement by any person, firm, or corporation other than the Supplier shall be made or be valid against the Village.
- N. **Provisions Severable.** If any term, covenant, condition, or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions shall remain in full force and effect and shall in no way be affected, impaired or invalidated.
- O. **Time.** Time is of the essence in the performance of this Agreement.
- P. **Governing Laws.** This Agreement shall be interpreted according to the internal laws, but not the conflict of laws rules, of the State of Illinois. Venue shall be in Cook County, Illinois
- Q. **Entire Agreement.** This Agreement constitutes the entire agreement between the parties and supersedes any and all previous or contemporaneous oral or written agreements and negotiations between the Village and the Supplier with respect to the Request for Proposal. The terms of the RFP and the Response provided by Supplier are incorporated herein by reference. In the event of a conflict between the terms of this Agreement and any other agreement between the Village and Supplier the terms of this Agreement shall prevail.
- R. **Waiver.** No waiver of any provision of this Agreement shall be deemed to or constitute a waiver of any other provision of this Agreement (whether or not similar) nor shall any such waiver be deemed to or constitute a continuing waiver unless otherwise expressly provided in this Agreement.
- S. **Exhibit.** Exhibit, A and Exhibit B are attached hereto, and by this reference incorporated in and made a part of this Agreement. In the event of a conflict between the Exhibit and the text of this Agreement, the text of this Agreement shall control.
- T. **Rights Cumulative.** Unless expressly provided to the contrary in this Agreement, each and every one of the rights, remedies, and benefits provided by this Agreement shall be cumulative and shall not be exclusive of any other such rights, remedies, and benefits allowed by law.
- U. **Rights Cumulative.** Unless expressly provided to the contrary in this Agreement, each and every one of the rights, remedies, and benefits provided by this Agreement shall be cumulative and shall not be exclusive of any other such rights, remedies, and benefits allowed by law.
- V. **No Waiver of Tort Immunity.** Nothing contained in this Agreement shall constitute a waiver by the Village of any right, privilege or defense available to the Village under statutory or common law, including, but not limited to, the Illinois Governmental and Governmental Employees Tort Immunity Act, 745 ILCS 10/1-101 et seq., as amended.

SECTION 9. GENERAL PROVISIONS (cont)

W. **Counterpart Execution.** This Agreement may be executed in several counterparts, each of which, when executed, shall be deemed to be an original, but all of which together shall constitute one and the same instrument.

Acknowledgement.

The undersigned hereby represent and acknowledge that they have read the foregoing Agreement, that they know its contents, and that in executing this Agreement they have received legal advice regarding the legal rights of the party on whose behalf they are executing this Agreement, and that they are executing this Agreement as a free and voluntary act and on behalf of the named parties.

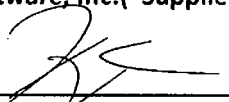
IN WITNESS WHEREOF, the Parties have executed this Agreement as of the dates set forth below.

VILLAGE OF BUFFALO GROVE

By: 
Dane Bragg, Village Manager

Date: 1/7/2021

BS&A Software, Inc. ("Supplier")

By: 

Name Kevin Schafer Title Account Executive

Date: 1/6/2021

SCHEDULE OF PRICES

Community Development Software

TO: THE VILLAGE OF BUFFALO GROVE

Respondent: **BS&A Software**

Business Address: **14965 Abbey Lane, Bath, MI 48808**

The undersigned, declares that it has carefully examined the proposed work, the Agreement, and all other documents referred to or mentioned in the Agreement documents and it proposes and agrees, if this Proposal is accepted, that it will contract with the Village, in the form of the Agreement attached, to complete all work required to successfully implement the "Solution", and that it will take in full payment therefore the sums set forth in the following Schedule of Prices.

SCHEDULE OF PRICES

| Item | Description | Cost |
|---|---|------------------------------|
| Services and Support Costs | | |
| A | Software | \$66,865 |
| B | Implementation & Integration Services | \$23,100 |
| C | Training Services (Including travel) | \$90,360 \$70,400 |
| D | Data Import (New World Systems) | \$42,470 |
| E | Software Support and Maintenance per year | \$0 (year 1) |
| Other Services and Costs | | |
| F | Annual Cloud Hosting (if applicable) | N/A |
| Other Ongoing Costs* | | |
| G | Annual Service Fees | \$18,875 |
| H | | |
| Hourly Rates for custom development* | | |
| H | \$200/hour | |
| I | | |
| J | | |
| Optional Costs* | | |
| K | Termination Assistance Services | NA |
| L | \$200/hour | |
| M | | |

*Respondent is to complete description in above table.

Total Solution Cost A+B+C+D+E ~~\$222,795~~ \$202,835

SCHEDULE OF PRICES

Community Development Software

Written amount of Total Solution Cost A+B+C+D+E Two Hundred Twenty-Two Thousand, Seven Hundred Ninety-Five Dollars

If your firm provides additional optional services (such as those listed on page 18) please attach a page describing the optional service and the cost for that service as well as any ongoing costs for that service.

Each Respondent shall be required to submit one original and two hard copies of pages 7-8 in a sealed envelope or box. All envelopes and packages containing prices shall be marked or endorsed:

VoBG-2020-04 Schedule of Prices for Community Development Software

2/10/2020

Date



Signature

Account Executive

Title

Kevin Schafer

Printed Name

kschafer@bsasoftware.com

E-mail



Cost Summary

Software is licensed for use only by municipality identified on the cover page. If used for additional entities or agencies, please contact BS&A for appropriate pricing. Prices subject to change if the actual count is significantly different than the estimated count.

Applications

Community Development

| | |
|--------------------------|-----------------|
| Building Department .NET | \$25,620 |
| Field Inspection .NET | \$10,760 |
| Business License .NET | \$14,345 |

BS&A Online

| | |
|--|-----------------|
| Community Development <i>Permit Application Feature - Enables contractors and the general public to submit permit applications online (A fee of \$2/application is accumulated and billed to the municipality).</i> | \$16,140 |
|--|-----------------|

Subtotal **\$66,865**

Data Conversions

Conversion scope and price are estimates, pending review of preliminary data.

Convert existing New World data to BS&A format:

| | |
|------------------------------------|-----------------|
| Building Department (Per Database) | \$21,775 |
| Business Licensing (Per Database) | \$12,195 |

Subtotal **\$33,970**

No conversion or database setup to be performed for:

Field Inspection

Customizations

| | |
|---|----------------|
| Custom import from third-party software to populate Building Department database with parcels, properties, and current owners. | \$1,500 |
| BS&A Integration with Laserfiche Document Management System Ability to store and retrieve document attachments in Laserfiche Document Management system, for all currently integrated BS&A applications. | \$3,000 |
| Export to New World Accounting (Journal Entries and AP Refunds) | \$4,000 |

Subtotal **\$8,500**

Project Management and Implementation Planning

Services include:

- Analyzing customer processes to ensure all critical components are addressed.
- Creating and managing the project schedule in accordance with the customer's existing processes and needs.
- Planning and scheduling training around any planned process changes included in the project plan.
- Modifying the project schedule as needed to accommodate any changes to the scope and requirements of the project that are discovered.
- Providing a central contact between the customer's project leaders, developers, trainers, IT staff, conversion staff, and other resources required throughout the transition period.
- Installing the software and providing IT consultation for network, server, and workstation configuration and requirements.
- Reviewing and addressing the specifications for needed customizations to meet customer needs (when applicable).

\$23,100

Implementation and Training

- \$1,100/day
- Days quoted are estimates; you are billed for actual days used

Services include:

- Setting up users and user security rights for each application
- Performing final process and procedure review
- Configuring custom settings in each application to fit the needs of the customer
- Setting up application integration and workflow methods
- Onsite verification of converted data for balancing and auditing purposes
- Training and Go-Live

| | | | | |
|------------------------------------|--------|----|----------|-----------------|
| Software Setup | Days: | 3 | | \$3,300 |
| Community Development Applications | Days: | 57 | | \$62,700 |
| | Total: | 60 | Subtotal | \$66,000 |

Post-Go Live Assistance

- Review and consult on streamlining day-to-day activities as they relate to the processes within the BS&A applications
- Assist customers with more detailed and advanced report options available within the BS&A applications
- Revisit commonly-used procedures discussed during training
- As needs arise, provide assistance with bank reconciliations
- \$1,100/day
- Days quoted are estimates; you are billed for actual days used

| | | | | |
|--|-------|---|--|----------------|
| Post-Go Live for all applications for which training was performed | Days: | 4 | | \$4,400 |
|--|-------|---|--|----------------|

Cost Totals

Not including Annual Service Fees

| | |
|--|------------------|
| Applications | \$66,865 |
| Data Conversions | \$33,970 |
| Customizations | \$8,500 |
| Project Management and Implementation Planning | \$23,100 |
| Implementation and Training | \$66,000 |
| Post-Go Live Assistance | \$4,400 |
| Total Proposed | \$202,835 |
| <i>Travel Expenses</i> | <i>\$19,960</i> |

Payment Schedule

- 1st Payment: **\$57,070** to be invoiced upon execution of this agreement.
- 2nd Payment: **\$66,865** to be invoiced at start of training.
- 3rd Payment: **\$78,900** to be invoiced upon completion of training.

Annual Service Fees

Unlimited support during your first year with the program is included in your purchase price. Thereafter, Service Fees are billed annually. After two (2) years, BS&A Software reserves the right to increase the Annual Service Fee by no more than the yearly Consumers Price Index for All Urban Consumers U.S. city average (CPI-U).

| | |
|----------------------------------|-----------------|
| Community Development | |
| Building Department .NET | \$5,125 |
| Field Inspection .NET | \$2,150 |
| Business License .NET | \$2,870 |
| BS&A Online | |
| Community Development | \$3,230 |
| Consulting Days | \$5,500 |
| Total Annual Service Fees | \$18,875 |

Exhibit B.



Request for Proposal

**Village of Buffalo Grove,
Illinois**

**VoBG-2020-04
Community Development Software**

Submitted by:

BS&A Software
14965 Abbey Lane
Bath, MI 48808
(855) 272-7638

Kevin Schafer
Account Executive
schafer@bsasoftware.com

Closing Date:
February 13, 2020
10:00 a.m. CT



14965 Abbey Lane
Bath, MI 48808
Toll Free: (855) BSA-SOFT
P: (517) 641-8900
F: (517) 641-8960
www.bsasoftware.com

February 13, 2020

Village of Buffalo Grove
Attn: Office of the Village Clerk
50 Raupp Boulevard
Buffalo Grove, IL 60089

We are pleased to respond to the Village of Dover's request for Permit and Inspections Management Software.

For nearly 25 years, BS&A Software has provided software solutions for local and county government. Governmental software is not a side-light or specialty product for us – governmental software is our sole focus. Our success is evidenced with over 15,000 installations of our various software applications for customers ranging in population from 1,000 to over 1,000,000.

Currently, there are over 600 installations of our Community Development Software Systems spread throughout 16 states. The following proposal outlines our company stability and history, technology strategy, superior products, and our unparalleled implementation and support services. We look forward to your positive consideration of our proposed solution.

Please do not hesitate to contact us with any questions you may have following the review of this proposal. I will be pleased to assist you, and can be reached at 855-272-7638.

Sincerely,

A handwritten signature in blue ink, appearing to read "KS", with a long horizontal line extending to the right.

Kevin Schafer
Account Executive
PH: 517.641.8900
FX: 517.641.8960
knixon@bsasoftware.com

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1.0 Executive Summary

Headquarters:

BS&A Software, Inc.
14965 Abbey Lane
Bath, MI 48808
(855) 272-7638

Primary Contact:

Kevin Schafer
Account Executive
PH: 517-641-8900
KSchafer@bsasoftware.com

Secondary Contact:

Jason Hafner, CPA
Director of Implementation
PH: 517-641-8900
JHafner@bsasoftware.com

Overview

BS&A Software is pleased to submit our proposal for your review. We have over 600 customers on our Community Development software. These customers range from small municipalities with hundreds of people to large municipalities that have over 100,000 residents. We obtained these customers by continually refining both our software and our processes, so that we deliver exactly what we promise, along with unparalleled support. All of our programs are built with the Microsoft .NET software development platform using the latest tools available. Our software uses Microsoft SQL as the database engine. BS&A programs currently provide all of the major functions requested. We are proposing a locally-hosted solution, with an unlimited number of concurrent users.

BS&A has included a summary project plan within this proposal and is able to complete this software implementation on time, and on budget. We fully understand the scope of this project including software installation, data conversions, project management, program training, and follow up support. All software and services proposed will be provided by BS&A Software, Inc. Furthermore, BS&A is the sole developer of our software systems. With the exception of hardware, our solution does not encompass any third-party product and services. We have completed 100's of implementations similar to this one, and are well positioned to handle this project. We will begin the implementation process as soon as the agreements are signed. Approximately 15 staff members will be involved throughout the implementation and training process. No other vendor will work with you, or care more about your project than the staff of BS&A Software. BS&A offers a fully integrated solution. Additionally, we do have the ability to interface third party software with several of our applications using built in generic import/export features.

BS&A Company Benefits

For 25 years, our trademark has been to provide great software and world-class customer service. You will quickly learn why BS&A has grown so positively through the worst of economic times; we are first and foremost concerned with long-term customer relationships.

- **Customer Support & Satisfaction** – BS&A believes that customer satisfaction is critical to the long-term success of any company. We are so confident in what our existing customers have to say that we provide a complete client list on our website. Feel free to contact any of our existing customers. If they do not say that we provide the absolute best customer support, choose another vendor.
- **Money Back Guarantee:** BS&A is so confident in our ability to provide quality software that we provide you with a guarantee. If you are not satisfied with a BS&A product at any time during the first year, simply return it and we will refund 100% of the price of the software.

BS&A Software Benefits

BS&A provides a completely integrated suite of products that offer the following advantages over other solutions:

- **Site License:** As a standard process, BS&A provides each municipality with a site license, whereby they can run our software on an unlimited number of desktops or with an unlimited number of concurrent users. This makes it practical to provide access to BS&A software to as many users and departments as desired without incurring any additional license costs.

- **Data Conversion:** BS&A sets the bar in terms of data conversion efficiency, and minimizes efforts on the Village's part. We simply require you to get us data and we take over from there. We are not particular about the format. Whether you choose to convert all of your data or just the critical components, BS&A will not produce any surprise or additional data conversion fees, unless changes to the scope of the conversions are requested.
- **Integrations:** BS&A provides out of the box and user configurable integrations for a large number of required systems (Banks, State Government, IRS, Benefit Providers, Purchasing Cards, etc.) We do not charge any extra fees for these integrations and, in most cases, we will create similar integrations at no cost.
- **Project Management:** BS&A representatives will deliver the implementation services for all of the proposed applications. BS&A will assume the role of primary contractor and will assume project management responsibilities. Our Project Managers, along with our Implementation & Training staff, have been involved in hundreds of successful projects similar to the Village's.

2.0 Project Services

Software Descriptions

All of our programs are built with the Microsoft .NET software development platform, using the latest tools available. All programs work with SQL Server 2008 or newer, which provides for the linking of databases through a seamless grouping method. What this means for our customers is: a) a reduction in data entry errors, b) minimal duplicate entry, and c) overall increased productivity.



1) Permit intake and Issuance: *The Solution must manage permit records from the application stage through issuance for same day permits, express permits (3-5 days turnover), and standard permits (7 – 10 days turnover) both online as well as, in-person and via email, monitor all building activity, issue a variety of permit types, link them to related records, account for all appropriate fees, and validate that contractors are licensed with the Village. The Solution must have the capability to accept payment and generate approvals for same day permit applications, must possess the functionality to alert both Customer and permit staff of the status of individual permit milestones including but not limited to approval, denial, and pending expiration. Examples of current permits include but are not limited to those listed in RFP Exhibit A.*

2) Plan Reviews: *The Solution must provide a visual workflow status that is clear to both the Customer and internal staff, must have the ability to add conditions of approval to the parcels and must have the abilities to (a) redline plans submitted electronically and (b) allow the plan reviewer to select comments from list of standard comments.*

3) Inspections: *The Solution must provide the functionality necessary to allow staff to monitor Codes and manage inspections associated with all building projects, reminders for follow-up inspections or needed activities.*

The Solution must provide the ability for staff to view, schedule, and modify inspections and record notes while in the field from laptops, PDA's, iPads and tablet devices. Additionally, the Solution must provide staff the ability to generate inspection results and reports in the field. VoBG-2020-04 10

4) Village Issued Licenses: Provide licensing functionality including contractor registration for all licenses issued by the Village that can be directly integrated into the permitting process. The Solution must facilitate all licenses for both issuances and renewals, have the capability to automate email renewal reminders and automatically assess any late fee. Examples of Licenses issued by the Village include but are not limited to those listed in RFP Exhibit A.

5) Plan Application Tracking/Workflows: The Solution must provide all licensed users with on-line reporting capabilities of all permit applications and license reviews from permit submission to issuance. The Solution must provide a visual workflow status that is clear to both the Customers and internal staff.

6) Reporting: The Solution must have the capability to generate reports using a combination of data elements maintained by permitting, inspection and licensing services, provide at least five (5) end-users with the capability to run statistical reports, where the output is generated in a desired format and required formats are to include but are not limited to pdf, xml, docx, and xls.

7) Code Enforcement: The Solution must provide the necessary functionality to allow for the monitoring of Code and management of violations associated with all building projects and property maintenance. The Solution must provide a module, which includes complaint intake, inspection, violation citation, ticketing, public reporting and notices. Key features and goals that must be part of the Solution include the ability to record inspections, enforcement, and resolution details within the application while in the field.

8) Online Portal/Web Interface Allows a Customer with online access to apply for permits, submit documentations, make online payments and view permit management. Additionally, the web interface or online portal will also allow timely notification of the status permit review and inspections.

9) GIS Mapping: Software shall consume secured ESRI REST services including feature services, map services, cached basemaps, and/or geolocator services. Respondent is responsible for working with the Village's GIS provider to ensure all GIS Mapping functionality is operated to the satisfaction of the Deputy Village Manager.

10) Integration and Migration:

- Integrates and uses ESRI ArcGIS 10.5 and later versions.
- Integrates with Microsoft Office 2016 and later versions for email, forms, spreadsheets and word processing. Ability to export data to MS Excel format.
- Interface directly with email capabilities (Outlook). Information should be easily replicated into an email to send outside of the software.
- Integrates with archive software Laserfiche (document management) through a live link.
- Migration of data from New World to the new proposed ERP solution.

1. A general description of the Respondent's ability to provide the requested services, as described in the Scope of Services. Include a list the key products and services you are proposing. Organize your response generally following the outline in the Scope of Work.

Our Community Development .NET applications have the ability to provide all of the requested services as described in the Scope of Services stated in the Village's RFP, as well as listed above.

Building Department .NET

Our feature-rich Community Development application suite provides comprehensive tools and processes for modern Community Development, Building, Code Enforcement, and Housing departments. A property's entire history can be accessed through one easily-navigated view. Manage any construction project, permit, code compliance, rental registration, certification, occupancy, or other inspection-related process.

Permits

Track permits from application to finish. From the start, the Add Permit wizard speeds data entry while ensuring critical information is entered. Link to existing Contractor and Licensee records, or add them on-the-fly. Calculate costs by selecting items from your fee schedules and add them to the invoice. Take payments, issue permits, and print receipts as required. Once the permit is issued, use Inspection tools to schedule and process inspections. Productivity tools assist you with the creation of letters and attachment of images and documents. Attach reminders manually or automatically through a workflow to a permit or inspection so that no follow-up gets lost in the shuffle. Use workflow rules to automate common activities: apply fees, schedule inspections, generate letters, create reminders, send emails, and more.

Inspection Scheduling and Tracking Tools

Use our flexible scheduler to set your appointments and schedule inspections. Create violations with user-defined checklists. Append information through our "Quick Text" screen. Track violations, their location, details, and current status. Use the violation text in Correction Notice letters or repair emails. Capture images of violations directly into the inspection history.

Code Enforcement

Track all property maintenance issues such as weeds, trash, inoperable vehicles, etc. The Code Enforcement feature of our Building Department software offers comprehensive management of the entire process. Once the case is generated, use Inspection tools to schedule and process inspections. Productivity tools assist you with the creation of letters and attachment of images and documents. Attach reminders manually or automatically through a workflow to an inspection so that no follow-up gets lost in the shuffle. Use workflow rules to automate common activities: apply fees, schedule inspections, generate letters, create reminders, send emails, and more.

GIS Integration

GIS integration allows for a direct link between your data and GIS maps, giving you a very powerful tool to view data, plot various datasets, and quickly view neighboring properties using Google® Maps, or through direct integration with GIS maps, if available.

Accounting Functionality

The Building Department application comes ready to handle the accounting requirements of your community. Enter invoices, take payments and bond deposits, do adjustments and transfers, and print receipts. Run balance reports to match your totals. Generate detailed and summary general ledger information for deposits.

Electronic Plan Review Management

BS&A offers integration with Bluebeam® for electronic plan review management. Bluebeam offers PDF-based workflow and collaboration solutions that are enabling the most document-intensive industries in the world to go paperless. Bluebeam's desktop, mobile, and server-based products improve digital documentation coordination between project teams in the office and in the field. BS&A is a Bluebeam Authorized Developer. BS&A does not sell Bluebeam, and Bluebeam costs are not included in attached pricing.

Field Inspection .NET

Use our tablet-enabled application to enter inspections while out in the field quickly and efficiently. User-defined checklists and Quick Text are available, along with handwriting recognition. Synchronize from home or through your office network. Quickly upload inspection results, generate letters, automatically send emails, and download changes with the press of a button. Tablets with built-in cameras may capture images and attach them directly to the inspection with a single click.

BS&A Online - Community Development

Provides web access to various components of the desktop Building Department application.

Key Features:

- Permit Applications: Enables contractors and the general public to submit permit applications online
- Inspection Scheduling: Enables contractors and the general public to submit requests for inspections online
- View My Activity: Enables contractors and the general public to easily access inspections and permits they have requested
- Building Department Search: Performs a search by any record number, including addresses, permits, and certificates
- Rental Property Search: Enables users to search for addresses that are flagged as rental properties
- Payment of Fees: Enables contractors and the general public to pay for permit and other fees online

Business Licensing .NET

This is a complete business licensing system that provides extensive table views and editing screens for tracking businesses and their licenses.

Key Features:

- Enter an unlimited number of businesses, license types, inspections, etc.
- Deny and approve licenses and renewals en-masse
- View multiple license statuses for a business on one license history screen
- NAICS codes are available to be searched as well as maintained when the codes change
- Verify passed inspections before issuing licenses
- Quick and easy renewal of licenses

2. Describe your ability to meet each of the Required Solution Features listed in the Scope of Services. The review of the Respondent's ability to provide the Required Solution Features shall be evaluated as a pass or fail. Organize your response generally following the outline in the Scope of Work.

Required Solution Features

The Solution to be provided hereunder shall meet the following requirements:

1. Seamless integration with Microsoft Outlook 2013 and later (integrate e-mail and calendar applications).

BS&A's Community Development application offers calendar-level integration with Microsoft Exchange, including 365. When inspectors are being scheduled, appointments added to their Exchange calendars via Outlook can reduce time available to schedule them throughout the day, whether it be for a short doctor appointment or multi-day blocks such as a vacation.

Using the integration, inspections scheduled within the application can be pushed to the users Exchange calendar and displayed in Outlook.

For email, we recommend using our proprietary email service which sends emails server-side over SMTP from a standard email address. Direct Outlook integration for emails is available, regardless.

2. Seamless integration with ArcGIS as noted above.

BS&A provides a few points of integration with GIS data, including specifically to ArcGIS.

Map Reproduction –

- a. BS&A provides an integrated mapping solution called ThinkGeo. This option requires shape files, aerials, etc., to be placed on the customer's network. The application reads the files directly from this location. Using this integration, a user viewing case data in the program can jump to the parcel on the map with the click of a button without leaving the program. From the map, the user can jump to case data for a different parcel by selecting it from the map. Additionally, the integration can be used to perform a number of other common processes such as plotting case data on the map, performing buffer notices for public hearings and generating letters, mailing labels, and envelopes.
- b. BS&A also provides the ability to set the URL for your web map within the application. When the user chooses the option to view the map, a browser is opened which navigates to the specified URL. A parcel number or address can even be included as a parameter in the URL which allows some web maps to shift focus to that parcel immediately.

Imports –

- a. The Community Development application, BD.Net, provides an interface to ArcGIS Rest Services for importing parcel, address, and ownership information into the BD.Net system. This user-defined import, which BS&A helps configure during implementation, allows the user to specify exactly where tabular data from a specified layer should import in BS&A. There are tools within this import to create advanced calculations from the source data in order to operate on data prior to it importing as well as to perform standard address parsing, and even perform USPS CASS Certified adjustments to the addresses.

Inspection/Review Mapping

- a. The BD.Net application has the ability to consume an area map for inspectors to define, then automatically assign inspectors and/or reviewers to a new task automatically based on the area within the community the case is located.

3. Provide a digital plan review capability either through a software module or through seamless integration with a third party provider (Subcontractor).

BS&A offers integration with Bluebeam® for electronic plan review management. Bluebeam offers PDF-based workflow and collaboration solutions that are enabling the most document-intensive industries in the world to go paperless. Bluebeam's desktop, mobile, and server-based products improve digital documentation coordination between project teams in the office and in the field. BS&A is a Bluebeam Authorized Developer. BS&A does not sell Bluebeam, and Bluebeam costs are not included in attached pricing.

4. Provide remote inspection application compatible with iPad for field use by the Inspectors.

While the applications do not run natively on the IOS platform, customers have used the RemoteApp role within MS Server to broadcast an instance of the application to be accessed remote by users on an IOS device. This requires very strong wireless connectivity throughout the service area.

5. Migration of all permit data and licensing data from the existing New World application.

BS&A has converted data from New World previously and would work with the Village to do the same.

6. Microsoft Active Directory Integration.

BS&A integrates with AD at the framework level to validate user credentials at login. Users configured in AD can be made available in BS&A applications. BS&A can validate against the AD password or require a separate password for the applications to be set.

7. Applications must run on Windows 10 client OS and Windows Server 2016 OS and later.

All versions specified are supported.

8. Shall have the ability to export data (e.g. excel, PDF, CSV) to allow archiving and updates to other ERP systems in a standard format at no additional cost.

BS&A provides data in table view in addition to other views. The tables can be filtered to include whatever data the user is looking for. Filters can even be saved and re-used later, creating views. Once the data is filtered as desired, it can be exported to Excel or CSV using and include whichever fields the user wishes to export. Additionally, a built-in report design tool allow users to design and push data to a report to be saved as PDF or XPS.

9. Shall provide the costs for on premise and hosted solutions for the village of Buffalo Grove.

BS&A provides an on premise solution in addition to our remote Field Inspection software. A hosted solution is not available at this time.

10. Online permit application, submission, and payment capabilities.(PCIDSS compliance required)

BS&A Online allows the public to view data that you wish to share. Users can search for property by parcel number, address, owner, or a specific record number (i.e. Permit Number).

User can submit applications for Plan Reviews, Permits, and Planning/Zoning cases. Additionally, using the Citizen Request for Action program, a user could submit a complaint to be routed to Code Enforcement or our Work Order software (optional additional application). Documents can be submitted online and payment collected using one of our integrated credit card processors.

Once permits or Certificates are in an allowable status such as after they are issued, a user can request an inspection online. Availability can be configured through a number of parameters within the program.

3. Provide a brief description, for each listed item, demonstrating how your proposed solution accomplishes each of the stated objectives listed as a Requested Solution Feature. Organize your response generally following the outline in the Scope of Work

Requested Solution Features

The Village expects that the Respondent be able to provide the following features and the cost must be included in the base Software price.

i. USER-DEFINED CONFIGURATION

1. Ability to configure user-defined timelines.

Assuming this requirement is in regards to the land development process, yes, all requirements can be identified using functions such as Projects, PZ Steps, Workflows, and system options.

2. Ability to maintain user-defined configuration, and data definitions effective after software release upgrades.

Supported. Configuration options are maintained after software updates.

3. System must allow for user-definition and maintenance of system look-up tables without requiring programmer intervention.

Supported. Configuration functions are available with appropriate access.

4. System should have a dashboard style page configurable by each user for viewing assigned or monitored work activities.

BS&A provides table views which can be filtered down to be used as saved views for users.

5. Ability by the end user to customize the proposed software and additional modules post-implementation.

Supported. Configuration functions are available with appropriate access.

6. Ability for the user to bookmark their favorite pages and have them load at system startup.

Users can set reminders on specific addresses or case records which appear when the user logs in. The user can jump to the record by clicking on the reminder.

7. Ability to set one contact as the main/primary contact associated with any application.

The Applicant is typically used for this purpose. An unlimited number of related names can be associated as well.

8. Ability to create a hierarchy of activities based on an organizational chart to follow a development process.

Supported using BS&A Projects and PZ Processes.

ii. PERMIT INTAKE AND ISSUANCE

(Permit Application)

1. Provide Customers with information about what is required in order to submit permit applications.

Supported

2. **Online permit submissions must have necessary marked field which is mandatory to fill out before proceeding.**
Supported
3. **Automatically create permit records once an online application is submitted, and allow manual entry for permit application received in person or via mail.**
Supported
4. **Flag and route applications through workflow based on criteria such as permit type, application contents and property details.**
Workflow is based on permit type. Sub-types can be defined to achieve necessary route.
5. **Prevent applications from being submitted online if the Customer or property does not match the Village records in the system.**
Supported
6. **All permits must be recorded under the respective address for the subject property.**
Supported
7. **Automated look-up for contractors registered within the Village when a permit is submitted requiring various trades.**
Supported

(Permit review intake)

8. **Review permit applications and route workflows to various Departments dynamically based on the results of their review.**
Supported
9. **Create and store preliminary findings from the permit review within the application, including any specific decisions about the applications and the associated timestamps.**
Supported
10. **Ability to share permit information and feedback within the various Departments during permit intake review.**
Supported
11. **Ability to set one contact as the main/primary contact associated with any permit application.**
Supported

(Permit Fees)

12. **Ease of adding and updating complex fee structures.**
Supported
13. **Built-in fee calculator across multiple types of permits/fees.**
Supported

(Address and parcel management)

14. **Ability for the system to prompt a message for administrative approval when an address cannot be verified.**
Case cannot be entered without address

15. Ability to support multiple parcels and addresses for each project

Each project must be related to a single address/parcel, however it can be related to another project that is associated with a separate address. For instance, a parcel which is split can keep the Subdivision case attached, then any projects started on the new child parcels can be related to the parent subdivision project to view any pertinent information such as deed restrictions, conditions of approvals, etc.

16. Ability to attach associated documentation to a permit or parcel record.

Supported

(Permit Counter Operations)

17. Provide data and tools to assist with management of permit counter volume.

BS&A recommends promoting online applications to reduce counter volume and even provide flyers/brochures to distribute to assist in that marketing initiative in order to on-board contractors quicker.

18. Provide all property details, including GIS Map View of the property, upon querying a permit or property address.

Supported

19. Capability to link any open permit cases to the GIS Community Portal for quick reference.

BS&A data is maintained on premise in a SQL server back-end that is accessible to the Village for consumption by any GIS service you wish to publish it to.

20. Auto calculates the permit fee associated with same day permits during permit issuance.

Supported

iii. **PLAN REVIEW**

1. **Track all plan review by selected address field, to add or access plan review comments from all Departments and Agencies.**

Supported

2. **Provide for logging dates sent, reviewed, due, rejected or approved.**

Supported

3. **Ability to redline plans submitted electronically.**

Supported using third-party Bluebeam Revu integration

4. **Ability for the plan reviewer in each Department to select a specific plan review comment from a list of standard comments. Also, have the capability of adding the Code sections.**

Supported

5. **Ability to merge conditions into letters and other documents along with sending these letters to recipients electronically.**

Supported

(Digital Plan Review)

6. **Allow Applicants to submit digital pdf format document plans to the Village as part of the Permit Application or separately.**

Supported

7. **Digital plans shall automatically be routed to specific departments depending on the permit type.**

Supported

8. **Versioning capability to manage multiple iterations of building plans, including check-in/check-out process for reviewing and working on building plans.**

Supported

9. **Electronic stamp approval upon successful completion of plan review.**

Supported using third-party Bluebeam Revu integration

10. **Ability to send the finalized plans to the Applicant electronically**

Supported

11. **Ability to integrate with Bluebeam digital plan review software if implemented by the Village at a later point of time.**

Supported

IV. **INSPECTIONS**

1. **Ability to provide configurable, flexible workflow engine, capable of defining and automating the business processes performed**

Supported

2. **Ability to create and send an email notification to interested party at various phases of any process.**

Supported

- 3. Ability to accept electronic plans or scan plans as they are submitted, these plans needs to tie to a plat or permit application.**

Supported

- 4. Ability to configure calendaring functions to plan, schedule and track work activities.**

Activities can be associated with a date due. These tasks can be managed using filtered views and automatic reminders (in-app or email) when coming due.

- 5. System should offer simultaneous access to data by concurrent users.**

Supported

- 6. Has the capability to assign and manage inspection cases in different queues based on the follow-up action required.**

Supported via Filtered Views

- 7. Send reminders to applicant to confirm appointment date; calls, texts to provide appointment reminders to Customers.**

Customers are sent notifications for verifying online inspection requests. Manual emails can be sent to the customer from within the application as well.

(Remote Inspections)

- 8. View, schedule, modify inspections, and record notes while in the field from laptops, iPads and tablet devices.**

Supported on laptops using FI.Net (offline, sync application for continued access to data), ipads and other non-windows tablets using Microsoft RemoteApp functionality.

- 9. Automatically reschedule property to follow up for a re-inspection when necessary.**

Supported

- 10. Allow pictures to be easily attached to inspections reports.**

Supported

- 11. Ability to be able to quickly access all contact details for the owner, applicant, contractor or complainant as well as attached plans.**

Supported

- 12. Capture notes related to specific violations.**

Supported

- 13. Ability to check off 'failed' and 'passed' inspection field categories after the inspection is complete.**

Supported

- 14. Ability to enter pre-specified or miscellaneous notes for each specific inspection.**

Supported

(Inspection Scheduling)

- 15. Ability to track both routine and periodic inspections of the buildings and property.**

Supported

16. Management of all inspection scheduling activities of all the inspectors on one screen layout for ease of access.

Supported via Inspectors View

17. Allow online Customer inspection requests through the web portal.

Supported

18. Provide calendaring functionality for inspectors that allow them to easily create a daily schedule from inspection requests.

Supported

19. Allow real time inspection results to be publicly available to all users including via email to permit holder.

Supported via BS&A Online and Email notifications

20. Provide dating functionality that provides ticklers for permits and inspections with no activity.

Supported

21. Functionality that allows an inspector to see a map of their daily inspections.

Supported

22. Permits should automatically close upon a successful final inspection and notify the front counter staff.

Supported

23. Allows for the monitoring of Codes and management of violations associated with all building projects

Supported

v. CODE ENFORCEMENT

(Complaints)

1. Submit complaints electronically.

Supported via BS&A's Citizen Request for Action (CRA) integrated application

2. Track the records of any complaints received.

Supported

3. Provide the complainant to be notified upon resolution of complaint case.

Supported

4. Document consent from the complainant to access property/unit if needed.

Supported

5. Ease of recording and recording history of complaints.

Cases can be submitted online by the public, or can be entered by staff in a matter of seconds within the office, and even quicker in the field using the Quick Violations functionality which can generate a case, inspection, letter, fee, and follow-up inspection in less than 5 seconds.

(Inspections)

- 6. Assign Inspection Cases to the relevant Code Enforcement Officer based on the configurable criteria.**
Supported
- 7. Send reminders to property owner to confirm appointment date; robo- calls, texts to provide appointment reminders to Customers.**
BS&A sends notifications via email
- 8. Ability to close violations upon confirmation of fix during re-inspection.**
Supported
- 9. Route cases to various participants for follow-up action based on inspection/case details.**
Supported
- 10. Configure forms and create templates for printed content, records to include enforcement case details captured in the solution.**
Supported

(Violations Management)

- 11. Record inspection, enforcement and resolution details within the application while on the property site.**
Supported via FI.Net or RemoteApp
- 12. Document identified violations and associated with a property.**
Supported
- 13. Assign multiple violations with a single case record under each subject property.**
Supported
- 14. Create and provide a Notice of Violation.**
Supported
- 15. Take photographs related to the case and automatically assign case- specific metadata that will associate them to the case.**
Supported
- 16. Capture all notes related to specific violation.**
Supported
- 17. Capability to print from a connected mobile device for ticketing services.**
Supported using FI.Net

(Code Enforcement)

- 18. Create and distribute citations' include work approval for warning letters.**
Supported
- 19. Submit request for ticketing; include workflow for the supervisor approval for tickets, with ability to modify ticket details as part of workflow.**
Not Supported. A Citation number can be specified within the case, however.

20. Automatically reschedule property for re-inspection upon notification of compliance or continued noncompliance after a preset amount of time.

Supported

vi. **REPORTING**

1. Ability for the end-users to customize, save and distribute reports.

Supported

2. Users are able to create queries and those queries for future use, and distribute to other users.

Supported

3. Ability for the users to select favorite report formats and group them into folders for future use.

Supported

4. View a preview of the report snapshot before printing.

Supported

5. Export reports into Adobe PDF, MS Excel or MS Word format.

Supported

vii. **VILLAGE ISSUED LICENSES AND RENEWALS (as shown in RFP Exhibit A)**

Online license form access and tracking. Automatic e-mail renewal and map mail- out notification

(License Issuance)

1. Create applicant records for tracking license numbers and payments associated with the projects.

Supported

2. Schedule review of submitted applications.

Review process Not Supported for contractor licensing, however licensing data can be maintained including final approval date, local, county, state registration/license numbers, and expiration dates.

3. Ability to send the standard letters to the applicants who are approved, provide notice of the date and time when the license is up for renewal again.

Supported

4. Ability to electronically to mail the license certificate to the applicant.

Supported

(License Renewal)

5. Ability to identify all licenses, which are set to expire each year.

Supported

6. Ability to create renewal letters/applications for distribution to the licenses and provide a reminder.

Supported

7. Provide license expiration information to the applicant.

Supported

8. Allow licenses renewals to be submitted via physical copy or the online portal.

Physical copy only at this time unless doing so during permit application.

9. In case of Contractor registration, classify any un-renewable licenses as 'inactive' in the solution upon expiration and prevent permits from being approved for that Contractor.

Supported

viii. IMPROVE SERVICE LEVELS AND RESPONSE TIME FOR ROBUST WORKFLOW AUTOMATION

1. Configure and utilize dropdown menus wherever appropriate.

Supported

2. Enable configurable workflow to incorporate policy requirements and constraints. Workflow routing should include the ability to assign activities linearly or in parallel.

Supported

3. Applications should walk users through appropriate steps and required fields and prompt users to begin a new process workflow based on certain criteria.

Supported

4. Configure review/approval steps for supervisors at any stage of the process.

Supported

5. Automate notifications (email, phone, text, dashboards) for Village staff users and Customers to prompt the next required task or provide a status update.

Supported – Email, In-App Notifications, and Filtered Views only

6. Ability for management to see the status of all work in progress, and the workflow automation should be reportable for management using dashboards or other visual reporting functionality to enable decision-making.

Supported via Filtered Table Views

ix. ZONING AND PROJECT PLANNING REQUIREMENTS

1. The Capability to develop schedules that will allow Village staff to prioritize tasks and activities

Due dates can be assigned to tasks related to cases. Filtered Views can be configured to manage upcoming activities.

2. Use data to define needs, set goals, plan interventions and evaluation progress.

Supported – May need more information to answer more in-depth.

3. Establish and maintain relationships between parcels, buildings and addresses.

Supported

4. Identify and maintain contact details for the primary point of contact for the property; track multiple contacts for a property.

Supported

5. Capacity to recognize specific property or case conditions and provide notice to supervisors for follow-up.

Not Generally Supported

6. Configure, capture, route tasks, and reports on properties.

Supported

7. Provide solution wide standard reports and custom report capabilities.

Supported

8. Provide validation tools that prevent or minimize the possibility of duplicate data entry.

Partially Supported – An Address (Property) table is used to validate and prevent duplicate entry of addresses.

9. Capable of tracking zoning applications and must have the ability to assign conditions to parcels.

While Conditions are not a native record type, conditions can be placed on a property using comments. BS&A also maintains a Variance record type which can be attached to a property when one has been approved via a PZ case.

x. **ONLINE PORTAL/WEB INTERFACE CAPABILITIES**

1. Submit an online application through a secure/credential based portal/interface.

Supported

2. Attach required documents with unlimited content management services.

Supported

3. Make secure online payments via credit cards and e-checks.

Supported via third party integrated processor

4. Communicate and notify staff through this channel.

Communication between staff and applicant made through BS&A Online.
Communications/Notifications for staff made through the desktop program and/or email notifications.

5. Based on application type, certain permits and licenses would be generated instantaneously.

Supported

6. Electronic plan review and mark-up tool to allow Plan Reviewers to receive, view, mark-up and communicate changes through a central citizen portal (currently Accela CRM)

Supported via Bluebeam Revu interface

7. Ability to update the backend real-time once a new application is received and route it to an appropriate workflow based on permit/license type.

Supported

8. Auto-schedule inspections from various departments and inspectors based on application type.

Supported

9. Provide the client a snap shot of all applications, outstanding fees etc. in a single dashboard.

Supported

10. Dynamic and useful client reports.

Reports are available client-side, not currently via the web

11. Provide a general portal based on staff criteria/input for all residents to lookup permits and licenses.

Supported

12. ArcGIS integration to view permits and licenses issued etc. through a geographical map.

This is supported as specified on page 10 above within the desktop application. For web mapping of cases, the Village GIS system would need to perform a lookup in the BS&A database via Linked Server connection and display on the Village's public GIS interface.

13. Ability to auto calculate fees based on selected criteria for permits and licenses.

Supported

14. Ability to auto-generate renewal invoices/notices and auto-email them to clients based on a set criteria. Also, allow to produce same invoice manually for clients who would rather receive these invoices via U.S.

Supported

15. Provide a robust and user friendly reporting tool with a host of custom reports, permits and licenses based on staff input for various Village departments.

Supported via BS&A's built-in Report Writer

16. Calendar and reminder feature which would notify staff and applicant through email on permit/licenses about to expire with an option to renew and make an online payment.

Notification is made via email. Staff extends the permit from within the application once extension fees are paid online.

5. Submit a detailed Implementation plan, which will address requirements, customizations, data migration, Implementation schedule, training schedule, delivery milestones, estimated hours of work effort, and responsibilities of each party.

Project Management

A member of our Project Management and Implementation Planning team will be assigned to coordinate your project. Our consultant will oversee the implementation process, schedule all necessary meetings, facilitate data transfer and conversion, and schedule training. All training proposed will be performed onsite at your offices. Coordination, documentation, and communication will be provided throughout the project by way of Microsoft SharePoint.

An overview of our planned method for a five-phase project management is as follows. BS&A is able to work with the timeline that best suits you.

Initiation: All projects begin with a Kick -Off meeting with the Project Stakeholders. Discussions then take place with each Department. The key is to ensure everyone is kept on the same page.

Planning: Comprehensive planning must occur through a variety of means. Planning is completed and is put in place through a formal Implementation Plan. The plan is specific to dates, timelines, tasks, and schedule of events.

Execution: Execution is an extension of the planning process. It puts the Implementation Plan in motion.

Control: We will have several basic control systems and some more formal quality control systems in place. Program installation, data conversions, training, and system testing will all have control system testing. The installation may be phased; therefore, testing of each implementation will occur at the appropriate time.

Closure: This is where the project is wrapped up. BS&A will remain onsite for the first several Go-Live dates, for each application if necessary. Additionally, follow-up visits may be scheduled to assess progress and answer questions. Of course, the technical support staff is always here for you.

In the event of a change in scope, the assigned Project Manager will first review the requested functionality with the appropriate Project Stakeholders, to ensure that there is a clear understanding of the desired outcome. Once this is completed, the Project Manager may consult with development staff, or



Project Management Highlights

BS&A employs a project management approach that is distinctly better for several reasons. With our staff, you will enjoy the following benefits:

- **The Customer:** The staff at BS&A Software is always concerned with the client's needs first
- **Details:** We will follow a detailed project plan that will ensure a smooth transition
- **Knowledgeable:** You will always be dealing with a professional, knowledgeable, and dedicated staff member
- **Passionate:** Throughout the project you will work with staff members that believe it is very important to always push ourselves and to never be satisfied with "good enough." Our goal is not to be a good company by providing good services. We want to be a great company by providing remarkable services.
- **Important:** Your Project Manager will guide you through the process and make sure you are the most important part of the process.
- **Every member of the BS&A team** treats each customer as absolutely crucial to the company's survival, as indeed, each customer is.

our Product Management team, in order to first determine if it is possible to accommodate the requested changes, then to determine if there will be cost involved, and finally to determine an estimated timeline for the implementation of those changes. Once this step has been completed, a Change Order, detailing the change in scope, as well as any impacts to cost or timeline, is prepared for customer review. At any stage during this process, the Project Manager may facilitate the exchange of information between BS&A's Product Managers and developers, and the appropriate customer personnel.

System Design and Documentation

BS&A is responsible for creating a Recommended System Design and Configuration. This will be accomplished by conducting an in-depth, onsite review of your existing process. The output of this review will be a set of recommendations and associated system design and configuration document. It is the Village's responsibility to review, approve, and/or adjust that design. Some parts of BS&A's recommended design may be items that the Village wishes to implement in the future. We will work with you to come up with a design that optimizes efficiencies, but takes into account your current practices, policies, and procedures. This will be provided to the Stakeholders electronically and reviewed during the onsite configuration/design review meeting. The outcome of that meeting and subsequent discussions will be to agree on a final system design/configuration.

Project Risk Management

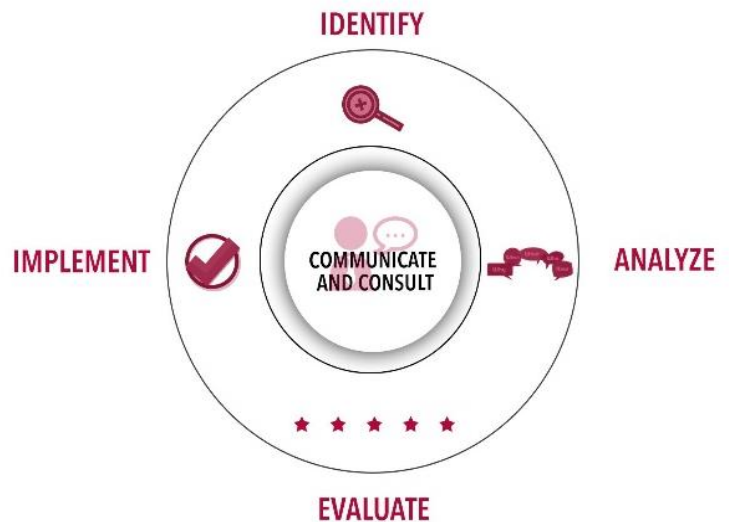
BS&A embeds risk management in every project. In our 25 years of data conversions and implementations we have learned this is an integral part of maintaining a successful project. Throughout the project your Project Manager will be in constant communication with you, and will schedule regular conference calls to keep everyone aware of the status of your project. Constant communication and consultation throughout the entire process is the best way to handle risk management.

The project risk management model that we follow is:

1. Identify
2. Analyze
3. Evaluate
4. Implement

Final Phase and Cut-Over

In the final phase of the project, you will be running BS&A as your primary system. From that point forward, all activity will be in BS&A. BS&A will be onsite during these Go-Live periods to help quickly resolve any problems that may arise. At the conclusion of this phase, we will transition you to our Support team.



Implementation Plan

Services include the planning and evaluation of current hardware and network, sources and format of legacy data, potential integration with existing systems, software installation, data conversion and training. BS&A does not intend on partnering with any other software vendors for this project.

Our goal is to make the transition from your current system as painless as possible. We utilize our extensive experience to accomplish this in an efficient, accurate and timely manner.

For example, many municipalities believe the best time to convert is at the start of a fiscal year. Our experience has shown that this is often the busiest time of year – not the optimal time to transition to new software. Once a general transition time is agreed upon, an implementation timeline is prepared. This schedule includes evaluation of your current hardware and network, sources and format of legacy data, potential integration with existing system, software installation, data conversion and training.

Implementation meetings are held to discuss/gather information about key topics like workflow process, unique reporting requirements, etc. As part of these meetings key team members from the municipality are identified and included, ensuring that all concerns are heard and any potential issues are addressed.

We strive to shorten the transition process as much as possible – a long transition equates to diminishing productivity. Typically, we can accomplish the entire process – from initial kickoff meeting to “go-live” – in six to nine months.

Implementation Approach

BS&A has developed a five phase approach to implementation.

Consultation: Each implementation will begin with a kick-off meeting. Here we will set the time table and develop the schedule for your onsite implementation and training. During the onsite Process Discovery meeting we will review your current processes, and make the recommendations for the best practices in BS&A.



Implementation Highlights

The staff at BS&A Software is specially trained, first and foremost, to take care of customers. We are not satisfied unless your staff is pleased with your software choice. The process is not complete without a solid implementation plan to follow.

Our Implementation process includes all services necessary to assure a successful transition.

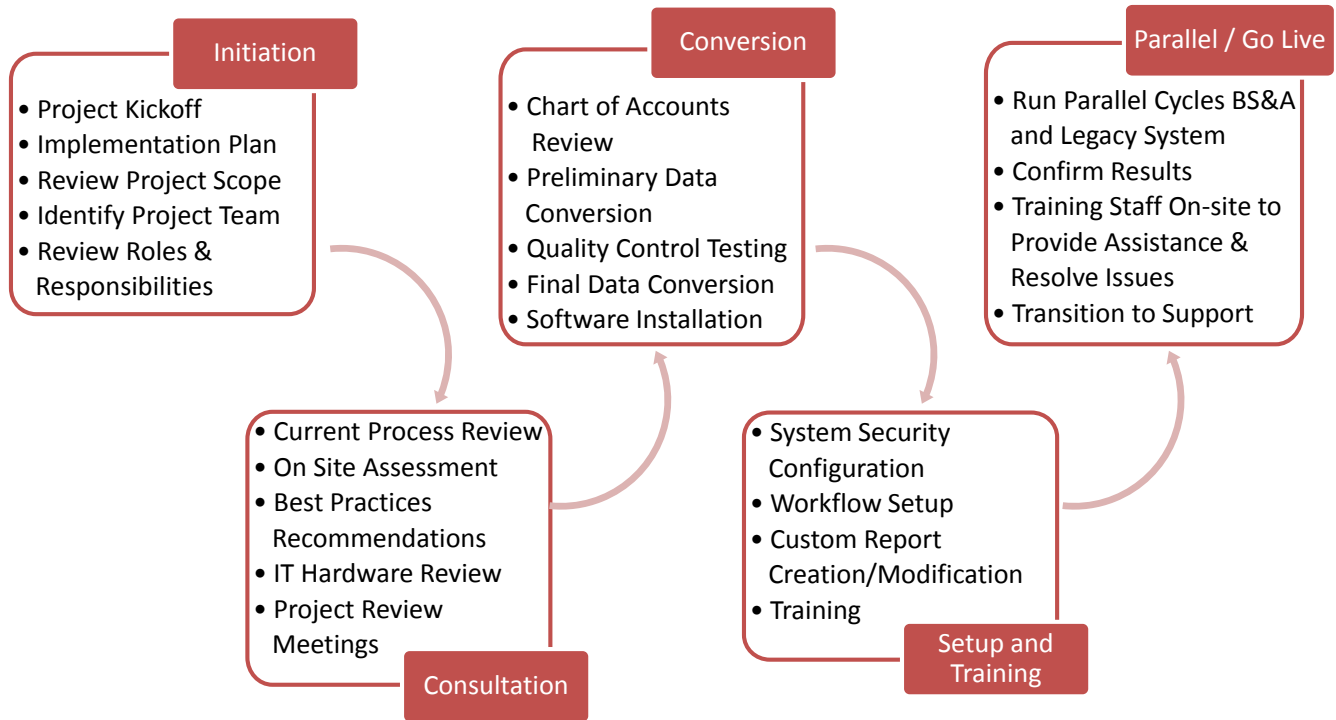
We will provide:

- Current Process Review
- Project Managers that understand your needs AND are Subject Matter Experts
- Implementation and Project Plans
- Project Update Conference Calls
- Program Installation/Network Configuration assistance
- Data Conversion from your legacy system
- Data review services – you will evaluate your converted data prior to your Go-Live
- Training Services that are tailored to your needs
- Follow-up training with advanced report design assistance.

Conversion: In this phase we install the software, run a preliminary data conversion followed by quality control testing, and finally perform the final data conversion.

Setup and Training: This phase consists of user and security setup, workflow setup, custom report creation and modification, and onsite end user training.

Go-Live: Our training staff is onsite working with you to perform your first live tasks and report runs. They will review the processes with you and transition you to the BS&A support staff.



Software Installation

Programs will be installed by BS&A for testing and learning purposes. This is informal and simply allows users to play with the applications prior to formal training. Data will be installed at a later date. This allows time for the staff to become familiar with the applications and review tutorials prior to formal training.

We have provided an option for the Village to obtain hardware and hardware support services through IT Right, our preferred provider. BS&A will assist in recommending the optimal hardware configuration for this installation.

Proposed Implementation Schedule

Dates are estimated based on the Village's calendar of events schedule and may be subject to change.

| Timetable | Scope of Work |
|------------------------|--|
| 1 Month Post Signing | Kick-Off Meeting – This meeting will assemble all project stakeholders to discuss expectations and concerns. BS&A Software will listen to the discussion, offer input as needed, and formulate a plan at the conclusion. |
| | Assemble Project Team – The respective Project Managers will administer the day-to-day operations of the project. |
| | Establish a timeline for project components such as conversions, customizations, program training. |
| 5 Month Pre Go-Live | Meet with the Village IT staff to identify possible network issues and review existing system configurations. |
| | Village reviews hardware requirements and begin the process of purchasing/installing new server(s) and workstations if necessary. |
| 4-5 Months Pre Go-Live | Preliminary Data Conversion & Data Review – Begin process of converting Village's existing data into BS&A, following the agreed upon conversion plan. |
| | Village sends preliminary data to BS&A for analysis and first run of data conversions. Upon completion of initial conversion, BS&A meets with key stakeholders to review conversion output. If necessary, the conversion will be updated and the process will be completed again until we have successfully converted all data. During this process, we will also gather requirements for any required program customizations. |
| 4 Months Pre Go-Live | Install programs in test environment for learning and evaluation purposes. This allows time for staff to become familiar with the applications, execute test cases and review tutorials prior to formal training. Final converted data to be installed at a later date. |
| 0-2 Months Pre Go-Live | Implementation/Training |
| | The converted data will go through a Quality Control test. BS&A will first review/test the data, and then pass it to the Village for their review and critique. |
| | BS&A begins Program Training. This will familiarize staff with the new software and processes. |
| 1 Month Post Go-Live | Evaluation |
| | After you are up and running we don't disappear. We will conduct a post project review meeting to tie up any loose ends and evaluate the entire process. We want your feedback to make sure you're completely satisfied and learn of anything that could be done to make our process better. |

Sample – High Level Work Plan

The following Sample Implementation Schedule details the overall implementation timeframe and schedule of events. The dates, times and order of events are subject to change based on availability of the Village and BS&A staff. This will be determined at the kick-off meeting should BS&A be the selected vendor. BS&A guarantees that the system will be fully functional according to the completion document once finalized at the commencement of the project.

Sample Implementation Schedule [Below Template will be updated to fit your needs]

| Task | Responsible Parties (Bold is Primary) | Start | Duration |
|--|--|-------------------------|---------------|
| Initiation Activities | | | |
| Conduct Kick-off Meeting | BS&A and Village | 1 month post signing | 1 day |
| Review Project Scope and Project Management Process | BS&A | 1 month post signing | 1 day |
| Establish Project Meeting Schedule | BS&A and Village | 1 month post signing | 1 day |
| Assemble BS&A Project Team | BS&A | 1.5 months post signing | 1 day |
| Assemble Village Project Team | Village | 1.5 months post signing | 1 day |
| Create Initial Project Timeline | BS&A & Village | 1.5 months post signing | 1 day |
| IT and Data Conversion Activities | | | |
| Meet with Village IT Staff to review Hardware Configurations | BS&A and Village | 5 months pre go-live | 1 day |
| Extract Preliminary Data from current System | BS&A and Village | 5 months pre go-live | 1 week |
| Conduct Data Mapping and Develop Data Conversion Routines | BS&A | 5 months pre go-live | 1 month |
| Conduct Review of Converted Data with Village | BS&A and Village | 4 months pre go-live | Approx. 1 day |
| Install Programs | BS&A | 4 months pre go-live | 1 day |
| Knowledge Transfer | | | |
| Conduct On-site Process Review Meeting | BS&A and Village | 3 months pre go-live | 2 days |
| Conduct Analysis of Current Forms | BS&A and Village | 3 months pre go-live | 1 day |
| Conduct Review of Required Reports | BS&A and Village | 3 months pre go-live | 1 day |
| Conduct Analysis of System Interface Requirements | BS&A and Village | 3 months pre go-live | 1 day |
| Develop Best Practices Recommendation | BS&A | 3 months pre go-live | 1 day |
| Approve Recommendations | Village | 3 months pre go-live | 1 day |
| Implementation | | | |
| Create Forms | BS&A | 0-2 months pre go-live | 2 days |
| Create Reports | BS&A | 0-2 months pre go-live | 2 days |
| Conduct Acceptance Testing | Village | 0-2 months pre go-live | 2 days |
| Conduct Final Data Extraction | Village | 1 week pre go-live | 2 days |
| Convert Final Data | BS&A | 1 week pre go-live | 2 days |

| | | | |
|--|-----------------------------|------------------------|--------|
| On-site Set-up for Users & Configuration Items | BS&A | 0-1 month pre go-live | 4 days |
| Training | | | |
| On-site Training | BS&A and Village | 0-2 months pre go-live | Varies |
| Post-Project Activities | | | |
| Conduct Post Project Review & Assessment | BS&A and Village | 1 month post go-live | Varies |
| Conduct Post Implementation Follow Up Training | BS&A and Village | TBD | TBD |

Data Conversion

Data conversion is the single most important aspect of any system implementation. We do not force you to provide us data in a pre-defined format or go through a complex process to create data mapped to a specific structure. Instead, we simply ask you to provide us with ASCII data (preferably MS SQL or Access), data definitions, and we will then take ownership of the conversion process. Whenever possible, we take all the risk of data conversion, by providing you with a “not to exceed pricing” rule. If the conversion takes more work than expected, we will complete the additional work at no additional charge to the Village. Of course, we will require your help in running reports and validating that the data is converted correctly, but it is our job to handle the conversion process – you just help us make sure we get it right.

Data Conversion Process

In the course of bringing hundreds of municipalities onto our Community Development software, we have fine-tuned our data conversion process to minimize the work on your part and maximize your ability to access past data. We have experience converting data from numerous different legacy systems. **We understand that your current building permit software is New World.**

Data Extraction & Formatting

BS&A will extract all of the data to be converted from your system. The City does not need to reformat the data in any way. The only thing required of the City is to run some reports to aid us in balancing the data.

Preliminary Data Conversion/Mapping

One of the first key activities in the project is to get an initial copy of your data. BS&A consultants will map your existing data into the appropriate fields within BS&A. This mapping will be used to drive the development of our data conversion routines. After a preliminary conversion is developed, we will interrogate the data and make sure it balances.

Data Review

Once we have converted the initial data, it will be installed onsite for review by your transition team and BS&A staff. Together, we will walk through the data – you are the experts on the information and we are the experts on our system. Any deficiencies in the raw data and/or conversion process are identified and addressed. An evaluation is also made of any missing pieces in the data that cannot be converted electronically. BS&A staff will often enter critical items to reduce your workload during the busy transition period. This data will remain on your test system for evaluation throughout the remainder of the process. If necessary, this step will be repeated until we have the data conversion approved.

Final Conversion

Just before the Go-Live date for a particular application, we will again extract a copy of your data. In this case, it will be data that includes all the latest transactions. We will re-run our conversion and load the data onsite into the appropriate BS&A application.

Scope of Data Conversion

The cost proposal identifies conversion costs. The scope of those conversions is specified in the following table.

| Application | Scope of Conversion |
|---------------------|--|
| Building Department | Property Information, Open Permits, and History data |
| Business Licensing | Businesses, Licenses, and History data |
| Field Inspection | No conversion or database setup to be performed |

Product Testing

The converted data will go through a Quality Control test. BS&A will first review/test the data, and then pass it to the District for their review and critique. The recommended approach to the following types of testing is:

1) System Testing

System Testing is the overall approach used to validate that an entire system satisfies the requirements, business, and operational objectives.

2) Integration Testing

Integration testing is intended to verify operational requirements between major applications, sub-systems, or modules. Test cases should be constructed to test that all modules interact correctly. Likewise, an Integration Test should be defined for each of the "Integration and Interfaces" requirements identified in the application specifications spreadsheet.

3) Stress/Performance Testing

Stress testing refers to tests intended to evaluate a system, module, or function under heavy load. The goal of these tests is to ensure the software will perform adequately under maximum loading conditions. BS&A recommends creating stress tests that will mimic maximum expected loading for critical functions. Similarly, Performance testing refers to the assessment of the performance of the system, module, or function from the perspective of the user. Performance testing is often done in conjunction with stress testing.

On-Site Classroom Training

BS&A will provide the existing documentation, training manuals, and texts to assist in the training process. The application-specific training materials are further broken down by process, so that it is possible to pick and choose materials appropriate for the particular training session. The training materials provided can be used, copied, combined and/or distributed for any Village training sessions.

End User Training Schedule

The estimated number of training days for end user training for Village staff on all software modules:

| | |
|-------------------------------------|----------|
| Software Setup | Days: 3 |
| Building Department .NET | Days: 37 |
| Field Inspection .NET | Days: 16 |
| Business Licensing .NET | Days: 2 |
| BS&A Online – Community Development | Days: 2 |
| Post-Go Live Follow Up | Days: 4 |
| Total: | 64 |

Assumptions & Resource Management

We expect that Village employees will require a different level of involvement throughout the implementation process. For example, early on we will need heavy IT related involvement to assure the network and hardware are set up and configured properly, and legacy data is extracted. During the planning stage we will need a small group to assist in putting together the final implementation schedule. During the training period, all users are expected to participate. Heavy users, responsible for the day-to-day accounting function, will require the most training. The occasional users will require much less formal training. When we do classroom style training we try and limit the number of attendees to 10 or less. In all cases, we utilize your data, which has the most relevance for your users and leads to best retention of training.

An expected commitment of Village employee time would be approximately 450 hours, including time necessary for implementation, conversion discussions and assistance and training time. This also considers that multiple employees will attend some training sessions. Some factors that might adversely impact the required time commitment of Village employees would include the following:

1. The estimate above assumes 1 person involved in training per application. If 5 employees were to spend 3 days in work order training, this would obviously increase the total number of hours by including 5 employee's time, rather than one. This number can only be determined by knowing the number of employees involved in each training session.
2. Significant changes/modifications of data as part of the conversion process. In some cases, customers have completely revamped their chart of accounts as part of the conversion process. Items such as this may require a significantly greater time investment for certain Village employees.
3. In many cases, BS&A is able to retrieve data from legacy systems used by our new customers with relatively little involvement from customers, other than some time spent verifying data layouts and information. Until the quality of the data and the method of data extraction can be known, however, it is difficult to determine the amount of time with great precision.

Resource Management

We will ask for the Village involvement in the following areas:

Preparation – Review of your requirements and expectations with your staff. Our staff will meet with your Directors to set timelines and deliverables.

Data Conversion – Extract the data from your current system so we can convert the data.

Report/Forms Development – Assist in the development.

Installation/Implementation – Assist in installing the programs and configuring the Network; assist in overall implementation process (reviewing converted data, setting up training rooms, etc.).

Training – See the “training” section of this proposal for the estimated number of days. Additional Technical Support personnel are available to assist your staff with the proposed applications and are included in the chart below.

Having a number of implementation specialists and trainers covering various areas of the project allows for the assigned team member to be scheduled exclusively to the Village implementation from beginning to end.

BS&A assumes the following skills/competencies in regards to Village staff:

- IT resources will have the knowledge and expertise to communicate effectively with BS&A IT staff, with regards to workstation/server/network specifications, and will be able to carry out the agreed upon plans. Village IT staff will also be able to assist with the extraction of data from the legacy system.
- Village will have at least one staff member to serve as a subject matter expert, for each individual application, or functional area. This person will be able to answer questions relating to process, workflow, and system requirements, as it relates to their area of expertise.
- Individual staff members will have working knowledge of using a windows based computer, as well as a working knowledge of the job duties relating to the job duties directly relating to the application.

Beyond the time directly invested in training activities, BS&A makes the following time related staffing assumptions:

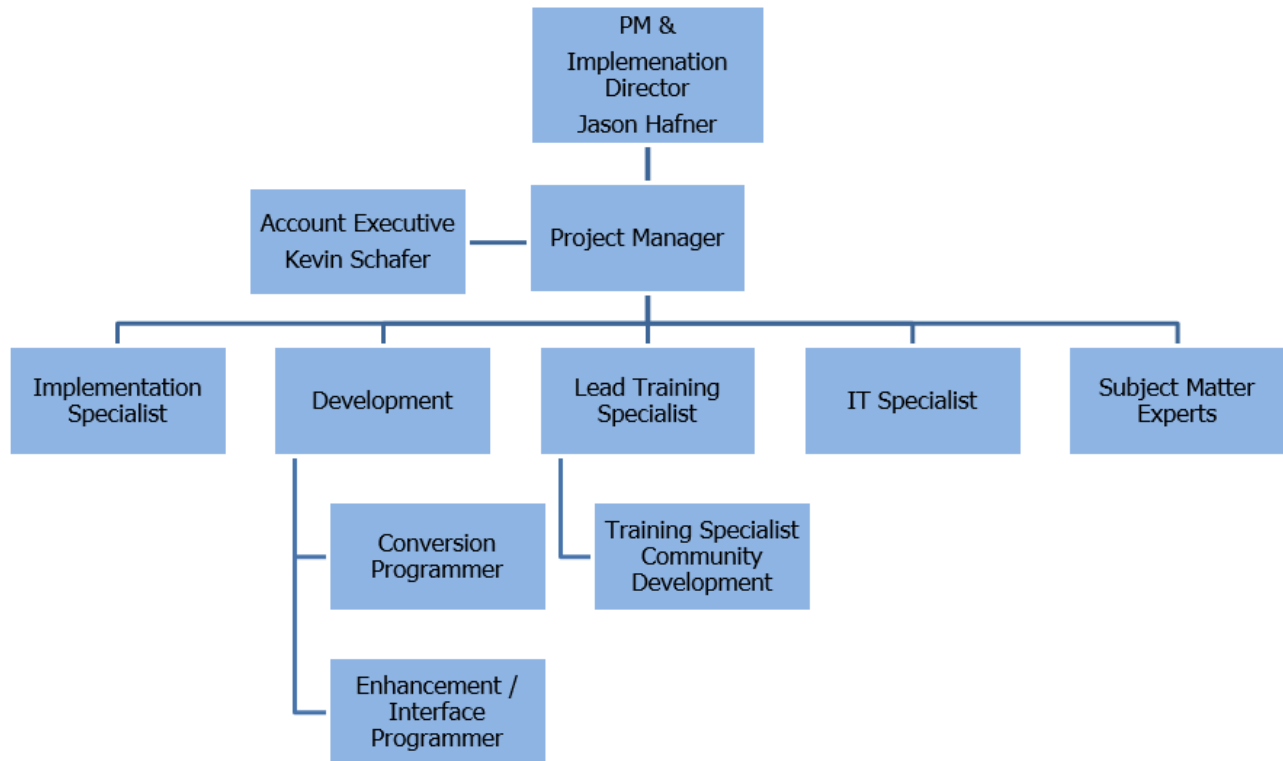
- Village subject matter expert(s) - .25 FTE for the duration of the project.
- Village IT staffing - .25 FTE for the duration of the project.
- Individual staff members – minimal involvement, beyond training, as required for testing purposes, or as needed by the Village’s subject matter expert.

BS&A’s Project Specific Roles

BS&A Software will use the following roles during the project:

- **Project Management and Implementation Planning Director**
 - Has overall accountability for the project and provides a point of escalation for the customer.
- **Account Manager**
 - Escalate internal issues as needed.
- **Project Manager**
 - Has day-to-day accountability for the project.
 - Scheduling and leading the Kick-Off Meeting
 - Manages and coordinates all activities and resources associated with the project.
 - Produces and maintains the project plan
 - Responsible for and leads the work associated with the development of the customer’s new processes
 - Leads the on-site process review
 - Hold regular conference calls with Organization project manager to review status and progress of project and to identify any outstanding issues
 - Manage Change Orders

- **Implementation Specialist**
 - Responsible for and leads the work associated with the development of the customer’s new databases
 - Participates in the on-site process review
 - Develops best practices recommendations
 - Assist with forms analysis & creation
 - Assist with data conversion analysis
 - Assist with report analysis & creation
- **Development**
 - Create custom integrations
 - Perform data conversion
 - Develop enhancements or bug fixes
- **Training Specialist**
 - Participates in creation of the training plan
 - Responsible for and leads the cutover and delivery of the training
 - One lead training specialist will be identified to coordinate all training activities
- **IT**
 - Assists with the extraction of test and production data from the customer’s existing applications.
 - Responsible for the installation of the BS&A applications on the customer’s production environment.
- **Subject Matter Experts**
May assist as required



Organization’s Project Specific Roles

We recommend the following roles for Organization employees for this Project

- **Project Champion**
 - Escalate and resolve issues raised by project manager
 - Insure Organization-wide buy-in and support
- **Project Manager**
 - Manage completion of project planning documents
 - Identify and communicate to BS&A project manager requirements for a successful implementation
 - Coordinate with BS&A project manager to develop and maintain implementation schedule which identifies specific milestones and establishes accountability
 - Schedule Organization resources for training: personnel, equipment and training rooms.
 - Identify additional employee training needs and update schedule
 - Ensure that employees accomplish tasks on time, including monitoring homework assignments
 - Review invoices and approve payment in accordance with the contract and associated milestones
 - Oversee project and monitor progress with BS&A project manager
 - Develop conversion specifications with BS&A
 - Coordinate analysis and proofing of conversion data
- **Subject Matter Experts**
 - Provide detailed policy/process information
 - Analyze potential policy/process changes
 - Subject matter experts on selected modules
 - Participate in knowledge transfer and analysis sessions
 - Sign off on system design
 - Participate in form design
 - Participate in validation of conversion
 - Participate in testing and parallels
 - Assign department resources for training and internal project tasks
 - Complete workflow and security templates for all end users
 - Attend all training sessions or appoint an appropriate management level designee
 - Assess end user competency on trained topics
 - Assess policy compliance
 - Provide end users with dedicated time to complete required homework tasks
 - Act as supervisor/cheerleader for the new BS&A processes
 - Identify and communicate to Organization project manager any additional training needs or scheduling conflicts
 - Help document lessons learned at end of each phase and signoff on formal acceptance for phase close-out
- **IT Specialist**
 - Assist with data extraction
 - Procure and install any required hardware
 - Add new users and printers
 - Perform basic server system maintenance
 - Ensure all users understand BS&A log-on process and have necessary permission for all training sessions
 - Ensure network and infrastructure is sound
- **End User**
 - Attend Training as offered
 - Complete tasks as assigned
 - Practice skills learned within training before live processing date.
 - Communicate departmental needs as needed

- Communicate any problems to project manager or subject manager expert
- Demonstrate competency with BS&A applications processing prior to GO LIVE

6. *Include a statement in your submittal obligating the Respondent to provide updates to later versions of all integrated software at no cost to the Village.*

Software Updates

Our support platform includes software updates/enhancements for each application that are distributed to all customers, with an active support agreement, on at least a monthly basis. Updates are accompanied by an update log that details the changes/enhancements.

7. *Describe the process of how your company works with remote customers.*

The BS&A Software applications are client-server applications, which would be installed at the Village and use a Microsoft SQL server, also administered by the Village. BS&A's support team uses tools to screen-share with customers when it is helpful to the support process. During Project Management, Implementation, and Training, BS&A team members will be onsite at the Village, doing process discovery, configuring software, and training users.

3.0 Training

1. Describe the training that accompanies the Solution implementation.

We prefer to train your staff using your data in conjunction with your go-live date. Our experience has shown that training too far in advance of actually using the software is easily forgotten. The coordination of data conversion, installation and training is crucial to a seamless transition – and is something we do very well.

Our trainers teach in a friendly, relaxed manner, which helps alleviate any apprehension your staff may have over learning a new system and helps them buy into the entire transition.

The training methods we utilize are perhaps the area where our flexibility is most evident. Where practical, we find a hands-on approach at your users' desk most effective. Depending on the size of the municipality, we can offer training in a classroom environment, using a screen and projector. In either case, we utilize your data, which has the most relevance for your users and leads to best retention of training.

The first step in the process is to jointly create an overall project implementation plan. From there, we will jointly develop a training plan that accommodates your requirements (vacations, elections, auditor, etc.). Training is conducted on-site, hands-on using your live data. The typical process is to walk through overall process. Once that is complete, we will then go into specific tasks. Trainers will remain on-site until the user community is up and running. Typically after 30 to 60 days of use, we bring the trainer back on-site to address any questions and reinforce prior training.

2. What types of training materials are provided?

BS&A will provide the existing documentation, training manuals, and texts to assist in the training process. The training materials provided can be used, copied, combined and/or distributed for any Village training sessions.



Training Highlights

The coordination of data conversion, installation and training is crucial to a seamless transition – and is something we do very well.

Our training process includes all services necessary to assure a successful transition.

This includes:

- Setting up user and user security rights for each application
- Modifying custom settings in each application to fit the needs of the customer
- Setting up application integration and workflow methods
- Onsite verification of converted data for balancing and auditing purposes
- Trainers who are experts in our system and hold accounting degrees.
- Using your own data for hands-on training.

After training is complete, we don't go away. We think it's important to revisit our customers one to two months post-training to follow up on any items covered during training that need to be refreshed. As needs arise, we can also offer assistance with bank reconciliations.

3. Is the training you are proposing on-site training?

On-Site Classroom Training

BS&A will provide the existing documentation, training manuals, and texts to assist in the training process. The application-specific training materials are further broken down by process, so that it is possible to pick and choose materials appropriate for the particular training session. The training materials provided can be used, copied, combined and/or distributed for any Village training sessions.

End User Training

The estimated number of training days for end user training for Village staff on all software modules:

| | |
|--------------------------------|-----------|
| Software Setup | Days: 3 |
| Community Development Training | Days: 57 |
| Post-Go Live Follow Up | Days: 4 |
| | Total: 64 |

Optional Post-Go Live Follow-up Training

BS&A strongly recommends follow-up training approximately 30 to 60 days after initial training. During these sessions we will work one-on-one with any users who require additional assistance. For this project, we would recommend 4 days of follow-up training. Activities include:

- Review and consult on streamlining day-to-day activities as they relate to the processes within the BS&A applications
- Assist customers with more detailed and advanced report options available within the BS&A applications
- Revisit commonly-used procedures discussed during training
- As needs arise, provide assistance with bank reconciliations
- \$1,000/day + travel costs
- Days quoted are estimates; you will only be billed for actual days used

If necessary, ~~additional~~ onsite training or support is available for \$1,000/day plus applicable expenses. Alternatively, remote web training is also available for a fee of \$140/hour. Several user group meetings are scheduled throughout the year. Meetings are held at our training facility in Bath, Michigan and are complementary to our customers. Webinar participation is available for those unable to attend the user group meetings in person. Additionally, videos of these meetings are available on our website shortly after the meeting takes place

Knowledge Transfer

Our team will ensure that all necessary staff is educated to the appropriate level that allows them to support and maintain the application in the most proficient manner upon the completion of implementation. Due to the comprehensive material presented, we fully anticipate and welcome the Village staff to utilize our technical support and online resources.

Additionally, we have detailed application training videos and corresponding written courseware. Our video courseware is designed for:

- ✓ New customers and prospects who want to gain some upfront knowledge before our implementation and training staff arrive onsite.

- ✓ Existing customers who want to understand important topics at a deeper level once they have become more accustomed to the software.
- ✓ Existing customers who have hired new personnel and would like to allow them get up to speed on their own schedule.

4.0 Software Support and Maintenance

1. Describe the software support/maintenance programs available.

Annual Service Fees

Unlimited service and support during your first year with the program are **included** in your purchase price. Thereafter, Service Fees are billed annually. After two (2) years, BS&A Software reserves the right to increase the Annual Service Fee by no more than the yearly Consumers Price Index (CPI).

Telephone, Email, and Fax Support

Our support staff is available Monday through Friday from 8:30 a.m. – 5:00 p.m. (Eastern). The average response time is less than 15 minutes; 95% of our support requests are answered in under 30 minutes. We do not have a voicemail service; calls are queued and taken in the order received. Support via email, fax, or remote assistance is also available. Email support requests can be initiated directly from within any BS&A application. With your annual support agreement, there is no limit on the amount of times you contact us. If you require occasional support assistance outside the normal business hours, arrangements can be made.

Toll-Free Support Line

BS&A's toll-free number is (855) BSA-SOFT. Support hours are Monday through Friday, 8:30 a.m. – 5:00 p.m. (Eastern).

Sharing Desktops

Our support consultants have the ability to connect with your workstation, so that we see exactly how you are encountering the problem. If needed, we can take over control of your desktop to walk you through a resolution. Likewise, we can use that tool to conduct webinars where we share our desktop with your users.

Onsite Support

BS&A staff will be at your location during the implementation, ~~training~~, and final Go-Live dates. Future onsite dates can be scheduled if needed. For example, if you want a representative onsite for training new staff, we can provide that. Additional onsite training or support is available for \$1,000 /day, plus travel expenses. We can also provide web training for a reduced cost.



Technical Support Highlights

Why is BS&A better?

- We believe our Support staff is the backbone of our organization. They consistently get rave reviews from our customer satisfaction surveys. If we gain your business, you'll enjoy world-class support services. We are focused on delivering unparalleled service, solutions, support, and satisfaction. You'll see this in our literature, but it's not just a marketing strategy; it's a mindset deeply embedded in our DNA. Our goal is to provide such remarkable customer service that our customers feel compelled to *remark* about it.
- We are extremely proud of the many long-term customer relationships we have built. We strongly believe that our success is directly correlated with putting the customer first and consistently choosing to *listen to them*. Delivering unparalleled customer service is the foundation of our company.
- Our company takes pride in the fact that customers can see their fingerprints throughout our software. They have provided us with many years of great ideas and suggestions. We truly value their feedback.
- Typically, our response to calls for support is immediate; however, on high call volume days it has taken about an hour. The average response time is less than 15 minutes.

User Groups

Several User Groups are scheduled throughout the year. These meetings are complimentary, and held at our training facility in Bath, Michigan. Webinar participation is available for those customers unable to attend the User Groups in person.

Online Knowledgebase

Our website includes a plethora of information for online learning. There are hundreds of task-specific tutorials for many applications. We also provide a link from within each of our applications to query software maintenance and enhancement cases.

Software Customization

On occasion, customers will ask for, and receive, custom modifications from BS&A directly, when there is a program feature that would be helpful to them, but may not benefit the majority of the customer base. By performing these customizations ourselves, BS&A is able to reduce or eliminate the amount of problems relating to local customizations, as well as provide these customizations at a price competitive to the costs to a municipality to employ a custom developer.

2. Does the maintenance program include all future software upgrades?

Software Updates

Our support platform includes software updates/enhancements for each application that are distributed to all current customers on at least a monthly basis, and are accompanied by an update log that details the changes/enhancements. Updates are distributed through the internet and saved to a directory on your server. In the case where a thin client technology is being used, this update must run (installed) once, but all users must be out of the program at that time. In the case of a standard client/server configuration, this process must run on each workstation, but it would not be required to have other users exit a program before updating. All updates are cumulative. There is no need to install each update in a sequential fashion in order to patch properly. In most cases, our customers do not develop local custom modifications, other than pulling/pushing information through ODBC connections.

BS&A Software has, and will continue to be, committed to statutory and process compliance changes as deemed necessary at the Federal or State level. Timetables have historically been aggressive, and all users with paid support agreements receive periodic updates. Program changes are researched thoroughly and active communication is maintained with the appropriate State agencies.

3. Describe the hours of support you provide? Where is your support center located? Is it staffed by your own employees or is it a third-party facility? Briefly discuss technical support staffing numbers and staff experience.

Telephone, Email, and Fax Support

Our support staff is available Monday through Thursday from 8:30 a.m. – 6:00 p.m. (Eastern) and Friday from 8:30 a.m. – 5:00 p.m. (Eastern), excluding holidays.

Toll-Free Support Line

BS&A's toll-free number is (855) BSA-SOFT. Support hours are Monday through Friday, 8:30 a.m. – 5:00 p.m. (Eastern), excluding holidays.

Our headquarters and support center is located in Bath, MI, fully staffed by our own employees.

BS&A believes that providing superior support is the key to success. We have over 30 staff members dedicated to supporting our software, along with an additional 16 software developers and programmers to provide a higher level of assistance when needed. Our technical support staff continuously receives outstanding evaluations from our current customer base!

EXHIBIT C Support Call Process

BS&A's standard hours for support are from 8:30 a.m. to 6:00 p.m. (EST), Monday through Thursday, and 8:30 a.m. to 5:00 p.m. (EST) on Friday, excluding holidays.

You can lodge a support request in three ways: (i) **Contact Customer Support** option located within the Help menu of all of our applications (ii) our toll-free support line (1-855-BSA-SOFT) or (iii) via email.

BS&A targets less than thirty (30) minutes for initial response ("Initial Response Target").

Customer service requests fall into four main categories:

- A. Technical.** Questions or usage issues relating to I.T. functionality, future hardware purchases, and configuration. BS&A tries to resolve these issues within BS&A's Initial Response Target or as soon thereafter as reasonably possible.
- B. Questions/Support.** General questions regarding functionality, use, and setup of the applications. BS&A tries to resolve these issues within BS&A's Initial Response Target or as soon thereafter as reasonably possible.
- C. Requests.** Customer requests for future enhancements to the applications. Key product management personnel meet with development staff on a regular basis to discuss the desirability and priority of such requests. BS&A tries to resolve these issues within BS&A's Initial Response Target or as soon thereafter as reasonably possible.
- D. Issues/Bugs.** Errors fall into three (3) subcategories:
 - i. Critical.** Cases where an Error has rendered the application or a material component unusable or not usable without substantial inconvenience, causing material and detrimental consequences to business -- with no viable Customer workaround or alternative. The targeted resolution time for critical issues is within one (1) day.
 - ii. Moderate.** Cases where an Error causes inconvenience and added burden, but the application is still usable by Customer. The targeted resolution time for all moderate issues is within two (2) weeks, which is within our standard update cycle.
 - iii. Minimal.** Cases that are mostly cosmetic in nature, and do not impede functionality in any significant way. These issues are assigned a priority level at our regular meetings, and resolution times are based on the specified priority.

Remote Support Process

Some support calls may require further analysis of Customer's database or setup to diagnose a problem or to assist Customer with a question. BS&A's remote support tools share Customer's desktop *via* the Internet to provide Customer with virtual on-site support. BS&A's support team is able to quickly connect remotely to Customer's desktop and view its setup, diagnose problems, or assist Customer with screen navigation.

EXHIBIT D Sample Statement of Work

5. Describe your service call escalation policy.

Escalation Options and Procedures

Our customers are our number one priority. Contacting your Project Manager is the preferred way to initiate the escalation process should a problem arise that you feel is not being given the appropriate attention or priority. The PM is responsible for and has access to all resources available in providing a resolution. A solution in these circumstances may be a temporary one that gets you going again as soon as possible while a more permanent solution is identified.

6. Do you have a guaranteed uptime? Describe your service level agreement for uptime.

a. Describe your Disaster Recovery solution, including Recovery Time Objective (RTO) and Recovery Point Objective (RPO)

Disaster Recovery

The BS&A applications are client-server applications, using a Microsoft SQL server that will be administered by the Village, and as such will be part of the Village's overall disaster recovery plan. BS&A will work with the Village IT team to integrate BS&A into that plan. This will include processes and procedures for back-up and restore of databases. BS&A maintains a web service that allows for download of new and updated versions of the all BS&A software. We will work with the IT team and provide the necessary training for downloading any required application software.

7. Include a statement in your submittal obligating the Respondent to provide support and service for a minimum of seven years. The statement shall include language that guarantees an upgrade to a new version if support for the Software provided to the Village is discontinued for any reason.

BS&A will commit to support the proposed software for a minimum of seven years. Should BS&A release a new version of the proposed software and discontinue support of the current software in the next seven years, BS&A will guarantee the Village an upgrade to the new version.

5.0 Software License

1. Describe the type(s) of license model offered for your software product. (Annual, Perpetual, Other)

As a standard process, BS&A provides each municipality with a site license, where they can run our software on an unlimited number of desktops or with an unlimited number of concurrent users. This makes it practical to provide access to BS&A software to as many users and departments as desired without incurring any additional license costs.

2. Copy of License Model

Refer to Section A, Paragraph 1 of our Software License and Services Agreement on the previous pages.

6.0 Company Profile

1. Profile and Qualification Form

PROFILE AND QUALIFICATIONS FORM

Each Respondent is required to fully answer all questions in each category listed below

All questions must be addressed by the Respondent in order for this application form to be properly completed. Failure to answer any question, or comply with any directive contained in this form may be used by the Village as grounds to find the Respondent ineligible. If a question or directive does not pertain to your firm in any way, please indicate with the symbol N/A.

1. Firm Name **BS&A Software** _____

Business Address **14965 Abbey Lane** _____

City **Bath** _____ State **MI** _____

County **Ingham** _____ Zip Code **48808** _____

2. Names and Titles of Two Contact People

A) **Kevin Schafer, Account Executive** _____ Phone (**517**) **881-6445** _____

B) **Jason Hafner, Project Management Director** _____ Phone (**517**) **641-8900** _____

3. Submittal is for:

Parent Company (List any Division or Branch Offices to be involved in this project) **N/A**

Division (attach separate list if more than one is to be included) **N/A**

Subsidiary **N/A**

Branch Office **N/A**

Name of Entity: _____

Address: _____

4. Type of Firm:

- Corporation
- Partnership
- Sole Ownership
- Joint Venture
- Other _____

5. Federal Employer Identification Number **38-3024767**

6. Year Firm was established **1991**

7. Name and Address of Parent Company: (if applicable) **N/A**

8. Acknowledgement of receipt of Addenda(s) _____ (list each addendum number)

Attach each signed addendum, if any, to the Proposal Packet as part of your submittal.

Date **1/23/2020**

(Sign here) By 

(Print Name) **Kevin Schafer**

Title **Account Executive**

E-mail **Kschafer@bsasoftware.com**

2. History of the Respondent's firm including any Awards, Affiliations and Accreditations (up to two (2) pages)

Mission Statement

BS&A Software is driven to excellence in all areas of our business by focusing 100% of our efforts on solving our customers' problems, creating deep customer relationships through unparalleled support, and pursuing continued improvement in our software through innovation and customer feedback.

Company History

Bellefeuil, Szur & Associates, Inc. was incorporated in the State of Michigan in 1991 with a vision of providing powerful public sector software to local government in Michigan. Our product line has since grown to an extensive list of 32 software products including a Financial Management Suite, a Property-Based Suite, a Community Development Suite, and companion products for local and county government. **With the growth in products, our customer base has expanded to include municipalities in 16 states. We focus exclusively on municipal government – all 2,000+ of our clients are local government entities.** One hundred percent of our annual revenue is from public sector customers.

Currently, we have over 600 public sector customers using the proposed applications. BS&A employs over 170 team members involved in software development, IT, sales, implementation, training, and technical support. Over 50% of our staff is dedicated to the development and support of the proposed applications. We are a privately held company, and have never been sold since our incorporation.

BS&A Software is an equal opportunity employer. BS&A Software prohibits discrimination based on a person's race, color, creed, national origin, age, sex, height, weight, religion, marital status, disability, pregnancy, genetic information, or any other characteristic.

Strategic Plan

BS&A Software has grown to become a well-recognized and successful software company for government in the Midwest. Our continued growth is dependent upon implementing the following:

- 1) Providing best in class community development software using leading edge technology at a value price.
Our talented software developers and community development product specialists continuously query the needs of our customers to ascertain where we should be from a technological and feature standpoint.
We are committed to accomplishing this goal from a value perspective. Our community development software suite has numerous high-end features at a value price.
- 2) Forging a company philosophy that challenges and rewards support technicians and software developers to consistently "go the extra mile" to solve customer issues.
Our company culture is completely "externally driven." Our team members are rewarded based on how well they have created satisfied customers.
- 3) Creating a "closed loop" feedback system between our customers, technical support, and software developers to allow for a lightning-fast problem resolution process.
It is very common for our customers, tech support personnel, and software developers to be on conference calls together so we completely understand the problem at hand. This allows us to quickly and efficiently solve any problems.
- 4) Continued investment in the development of our products by keeping a vigilant eye on the needs of our customers.
We are adding new features to our software every single day. The vast majority of these features are

requests from our existing customer base. We are second to none when it comes to responsiveness to our customers.

- 5) Expert and detailed data conversion skills to make the software transition as seamless as possible.
We have successfully converted data from a wide variety of software platforms, using a similarly wide variety of databases.
- 6) Integrity, honesty, and a strong desire to be "extremely easy to do business with."
We pride ourselves on doing what we say we are going to do. We are straight shooters throughout the entire process. We strive to be "easy to do business with" by:
 - a) Not charging support fees for our applications the first year of our agreement (most of our competitors do).
 - b) Holding final invoicing for our software and training services until everything has been delivered. Many times, software implementations take several months to complete.
 - c) Offering a one-year, money back guarantee on our software. If, up to a year after installation, you are not happy with our software and service, you can return the software for a full refund.

Customer Retention

Our superior software and service have not gone unnoticed in our market. Our track record speaks for itself. Over 2,000 government municipalities have successful implementations of one or more BS&A Software products. BS&A Software has enjoyed unprecedented 99% customer retention over our entire product line for 25 years.

Keys to Success

All of our team members are trained in providing great customer service. In order to ensure a successful system and implementation, we have identified the following objectives and strategies:

1. **Implement Operational Improvements:** Little is gained by simply purchasing new software and continuing existing practices. BS&A strongly believes that while implementing a new system, numerous opportunities will arise to eliminate operational inefficiencies. Our experienced implementation consultants will work together with your team to identify and incorporate changes within their department that will allow them to "work smarter, not harder."
2. **Focus on Training:** A major contributor to the success of a new system is the need for a concerted effort towards initial and on-going training of staff. BS&A uses experienced trainers so that all parties are able to effectively utilize the system and features.
3. **Fully Integrated Solution:** The advantages of having a completely integrated solution are numerous. First, everyday activities like querying and reporting are consistent throughout a range of products. More importantly, though, an integrated solution eliminates manual and redundant data entry.
4. **Implementation Experience:** A project of this type requires a significant amount of effort to efficiently implement. BS&A has been involved in thousands of implementations, and provides highly experienced project management and technical resources.
5. **Support:** Delivering the highest quality customer care is essential to your success. We consider it the highest priority of our organization. Our closed-loop feedback system between customers, tech support, and developers delivers lightning-fast resolution to any issue.

Continued Growth

Our gross sales have increased an average of 20% per year over the last several years. We are a consistently profitable organization that averages 20+% profit margins. We are managed very conservatively and carry no long-term corporate debt. Our gross income was nearly 28.5 Million in 2016, \$27 Million in 2017 and over \$28 Million last year.

7.0 Resumes

1. Provide the names of the point of contact and project manager for this project.

Account Executive

| | | |
|------------------------------------|---|--|
| Name | Kevin Schafer Account Executive | |
| Education | Bachelor's degree in Sales and Business Marketing | |
| Date of Hire | 2011 | |
| Responsibilities | Sales executive for ERP Systems | |
| BS&A Project Experience | Involved in numerous local and county implementations including Melvindale City, MI; Flagler Beach, FL; Huron County, MI; Missaukee County, MI; and Muskegon Heights City, MI | |
| Prior Work Experience | 2008-2011 2004-2008 | <i>Lipari Foods - Account Manager</i> <i>US Capital Mortgage - Loan Officer</i> |

Project Management & Implementation Planning Team

BS&A Software will provide information on personnel likely to be assigned to the project. In an effort to most effectively use resources, personnel will be assigned to the project upon commencement of implementation.

| | | |
|------------------------------------|--|--|
| Name | Jason Hafner, CPA Director of Project Management and Implementation Planning | |
| Education | Bachelor's degree in Accounting | |
| Date of Hire | 2003 | |
| BS&A Project Experience | Involved in numerous local and county implementations including Greenfield, WI; Muskegon County, MI; Northbrook, IL; Clark County, OH; Skokie, IL; Longboat Key, FL; Great Lakes Water Authority, MI | |
| Prior Work Experience | 1998-2003 | <i>Abraham and Gaffney-Certified Public Accountant Firm -Senior in charge Accountant; Set up and training of new software; Conducted audits of governmental entities</i> |

| | | |
|------------------------------------|---|--|
| Name | AJ Wood Community Development Database Technician | |
| Education | Bachelor Degree in Finance | |
| Date of Hire | 2015 | |
| Responsibilities | Implementation logistics; data conversions; training arrangements, Report Designer, data and logical program testing | |
| BS&A Project Experience | Involved in numerous local and county implementations including Northbrook Village, IL; Town of Salem, WI; City of Greenfield, WI; City of Alachua, FL; Village of Skokie, IL | |

| | | |
|------------------------------|-------------|--|
| Prior Work Experience | 2015 – 2018 | <i>BS&A Software</i> – Community Development Implementation Specialist |
|------------------------------|-------------|--|

| | | |
|------------------------------------|--|--|
| Name | Kevin Keyes Community Development Project Manager | |
| Date of Hire | 2011 | |
| Responsibilities | Implementation logistics; data conversions; training arrangements, Report Designer, data and logical program testing | |
| BS&A Project Experience | Involved in numerous local and county implementations including Lansing, MI; Livingston County, MI; Warren, MI; Skokie, IL; Northbrook, IL; North Little Rock, AR; Peachtree City, GA; West Melbourne, FL; Sullivan’s Island, SC; Jeffersonville, IN; Altoona, PA; Linn County, IA | |
| Prior Work Experience | 2007-2010 | <i>IBM</i> – Software and hardware implementations, involving over 6,000 hours of on-site training |

| | | |
|------------------------------------|---|---|
| Name | Jeremy Latuszek Community Development Project Manager | |
| Education | Bachelor’s degree in Marketing | |
| Date of Hire | 2008 | |
| Responsibilities | Implementation logistics; data conversions; training arrangements, Report Designer, data and logical program testing | |
| BS&A Project Experience | Involved in numerous local and county implementations including Skokie, IL; Tifton, GA; Altoona, PA; Sullivan’s Island, SC; Jupiter Island, FL; Shoreview, MN; La Vista, NE; Winfield, IL; Prior Lake MN; Tequesta, FL; Lake Bluff, IL; Wyoming, MI | |
| Prior Work Experience | 2008-2012 | <i>BS&A Software</i> – I.T. Support |

2. Organizational chart identifying disciplines, specific personnel, and role of those who will be assigned to this project.

BS&A Software will provide information on personnel likely to be assigned to the project. In an effort to most effectively use resources, personnel will be assigned to the project upon commencement of implementation.



Community Development Project Organizational Chart



3. Resumes of key personnel to be assigned to this project.

Implementation and Training Team

BS&A Software will provide information on personnel likely to be assigned to the project. In an effort to most effectively use resources, personnel will be assigned to the project upon commencement of implementation.

| | | |
|------------------------------------|--|--|
| Name | Rob Burritt Director of Implementation and Training | |
| Education | Bachelor's degree in Accounting | |
| Date of Hire | 2011 | |
| BS&A Project Experience | Involved in numerous local and county implementations including Clinton Charter Twp, MI; Huron Charter Twp, MI; Redford Twp, MI; Shorewood Village, WI; Festus, MO; Marquette, MI; Angola, IN; Grand Haven City, MI; Jeffersonville, IN; Flint, MI; Jackson County, MI; Westland, MI | |
| Prior Work Experience | 2006-2011 | <i>RTS Consulting, Inc.</i> – Senior Client Manager; Installed and configured software systems, training, provided recommendations for new software procedures |
| | 2000-2006 | <i>TCI Solutions/Retalix Ltd.</i> – Manager/Professional Services; Training on new software procedures, software implementation, consult and coordinate with analysts and programmers to design and develop automated business procedures. |

| | | |
|------------------------------------|---|---|
| Name | Cindy Baran Community Development Implementation Specialist | |
| Education | Bachelor's degree in Entertainment, Sport, and Promotion Management | |
| Date of Hire | 2016 | |
| Responsibilities | Implementation, Training & Support of BS&A Software Community Development Systems | |
| BS&A Project Experience | Involved in numerous local and county implementations including: Grand Haven Twp, MI; Greenville, MI; Round Lake Beach, IL; Gilberts, IL; Elburn, IL; Flint, MI; Island Lake, IL; Skokie, IL; Longboat Key, FL; Tequesta, FL; Gretna, NE; Bennettsville, SC; Isle of Palms, SC; Rochester, MI; Royal Oak, MI; Livingston County, MI | |
| Prior Work Experience | 2014-2015 | <i>Macomb County's Martha T. Berry Medical Care Facility</i> – Administrative Support |
| | 2013-2014 | <i>Northwood University</i> – New Student Coordinator for Admissions |
| | 2001-2016 | <i>Professional Figure Skating Coach</i> |

| | | |
|------------------------------------|--|--|
| Name | Kelly Garner Community Development Implementation Specialist | |
| Education | Bachelor's degree in Public Administration and Political Science | |
| Date of Hire | 1996 | |
| Responsibilities | Implementation, Training & Support of BS&A Software Community Development Systems | |
| BS&A Project Experience | Involved in numerous local and county implementations including West Melbourne, FL; Oakland County, MI; Lincolnshire, IL; Greenfield, WI; Channahon, IL; Warren, MI; Charlevoix County, MI; Plymouth Twp, MI; Roseville, MI; Madison Heights, MI | |
| Prior Work Experience | 1996-2012 1993-1995 | <i>BS&A Software</i> – Training and support of property applications <i>City of Battle Creek</i> – Property Appraiser |

| | | |
|------------------------------------|---|---|
| Name | Kyle Schian Community Development Implementation Specialist | |
| Education | Bachelor's Degree in Finance & Business Administration | |
| Date of Hire | 2015 | |
| Responsibilities | Implementation, Training & Support of BS&A Software Community Development Systems | |
| BS&A Project Experience | Involved in numerous local and county implementations including: Southfield, MI; Warren, MI; Romulus, MI; Dearborn Heights, MI; Macomb Twp, MI; Clark County, OH; Greenfield, WI; Victoria, MN; Skokie, IL; Park Forest, IL; Lincolnshire, IL; Overland, MO; North Little Rock, AR; Woodstock, GA; Medley, FL | |
| Prior Work Experience | 2014-2015 | <i>Nolan Transportation Group</i> – National Accounts Manager |

8.0 Qualifications and Experience

1. Related experience during the past five (5) years, including (up to six [6] pages):

a. The Respondent's firm shall have a minimum of five (5) years of acceptable local governmental experience of similar size and scope. The Respondent shall describe experience on five (5) project references with contact names, titles, telephone numbers, e-mail, and mailing addresses. In documenting experience, the Respondent should specifically describe the project, significant implementation challenges, and the implemented solutions. Detail how your firm specializes in solutions for local governments. Provide information on when each project was awarded and when it was completed.

| | |
|----------------------------|--|
| Customer | Village of Libertyville, Lake County IL |
| Contact Person | Ariel Tax |
| Title | Assistant Finance Director |
| Phone Number | (847) 918-2013 |
| Email Address | atax@libertyville.com |
| Contract Date | 12/2011. |
| Modules | General Ledger .NET, Accounts Payable .NET, Cash Receipting .NET, Payroll .NET, Human Resources .NET, Miscellaneous Receivables .NET, Utility Billing .NET, Community Development .NET and BS&A Online/Public Records Search |
| Population | 21,760 |
| Converted From: | MSI |
| Project Experience: | Planned and executed implementation of BS&A Software applications, including conversion of existing data to BS&A format; process discovery and counsel on program configuration; performed preliminary and final conversions of data; transferred knowledge to training teams and provided excellent customer service and communication channel for the duration of the project. |

| | |
|------------------------|---|
| Customer | Village of Morton Grove, Cook County IL |
| Contact Person | Boyle Wong |
| Title | Information Systems Manager |
| Phone Number | (847) 663-3021 |
| Email Address | bwong@mortongroveil.org |
| Contract Date | 2014 |
| Modules | BS&A Online/Community Development, BS&A Online/Public Records Search, Building Department .NET, Business License .NET and Field Inspection .NET |
| Population | 23,500 |
| Converted From: | Springbrook |

| | |
|----------------------------|--|
| Project Experience: | Planned and executed implementation of BS&A Software applications, including conversion of existing data to BS&A format; process discovery and counsel on program configuration; performed preliminary and final conversions of data; transferred knowledge to training teams and provided excellent customer service and communication channel for the duration of the project. |
|----------------------------|--|

| | |
|----------------------------|---|
| Customer | City of Lake Forest, Lake County IL |
| Contact Person | Diane Horn |
| Title | IT Business Analyst |
| Phone Number | 847-810-3598 |
| Email | hornd@cityoflakeforest.com |
| Address | 220 E. Deerpath, Lake Forest, IL 60045 |
| Contract Date | 3/2018 |
| Modules | BS&A Online/Community Development, BS&A Online/Employee Self Services, BS&A Online/Financial Services, Accounts Payable .NET, Building Department .NET, Business Licensing .NET, Cash Receipting .NET, Citizen Request for Action .NET, Fixed Assets .NET, Field Inspection .NET, General Ledger .NET, Human Resources .NET, Miscellaneous Receivables .NET, Purchase Order .NET, Payroll .NET, Timesheets .NET, Utility Billing .NET, Work Orders .NET |
| Population | 19,612 |
| Converted From: | HTE |
| Project Experience: | Planned and executed implementation of BS&A Software applications, including conversion of existing data to BS&A format; process discovery and counsel on program configuration; performed preliminary and final conversions of data; transferred knowledge to training teams and provided excellent customer service and communication channel for the duration of the project. |

| | |
|-----------------------|--|
| Customer | Village of Northbrook, Cook County IL |
| Contact Person | Lori Baker |
| Title | Chief Information Officer - IT Department |
| Phone Number | (847) 664-4080 |
| Email | Lori.Baker@northbrook.il.us |
| Address | 1225 Cedar Lane, Northbrook IL 60062 |
| Contract Date | 2015 |
| Modules | BS&A Online/Community Development, BS&A Online/Employee Self Services, BS&A Online/Financial Services, Accounts Payable .NET, Building Department .NET, Business Licensing .NET, Cash Receipting .NET, Citizen Request for Action .NET, Fixed Assets .NET, Field Inspection .NET, General Ledger .NET, Human Resources .NET, Inventory Management .NET, Miscellaneous Receivables .NET, Purchase Order .NET, Payroll .NET, Timesheets .NET, Utility Billing .NET, Work Orders .NET |

| | |
|----------------------------|--|
| Population | 33,600 |
| Converted From: | GEMS |
| Project Experience: | Planned and executed implementation of BS&A Software applications, including conversion of existing data to BS&A format; process discovery and counsel on program configuration; performed preliminary and final conversions of data; transferred knowledge to training teams and provided excellent customer service and communication channel for the duration of the project. |

| | |
|----------------------------|--|
| Customer | City of Plymouth, Hennepin County MN |
| Contact Person | Steve Juetten |
| Title | Community Development Director |
| Phone Number | 763-509-5401 |
| Email | sjuetten@plymouthmn.gov |
| Address | 3400 Plymouth Boulevard, Plymouth, MN 55447 |
| Contract Date | 12/2018 |
| Modules | BS&A Online/Community Development, Building Department .NET, Citizen Request for Action .NET, Special Assessment .NET |
| Population | 78,395 |
| Converted From: | Harris |
| Project Experience: | Planned and executed implementation of BS&A Software applications, including conversion of existing data to BS&A format; process discovery and counsel on program configuration; performed preliminary and final conversions of data; transferred knowledge to training teams and provided excellent customer service and communication channel for the duration of the project. |

2. Provide information on the Respondent's number of public sector vs. private sector clients.

One hundred percent of our annual revenue is from public sector customers. Currently, we have over 600 public sector customers using the proposed applications.

11.0 Additional Information

Building Department

This screen capture shows the "master" Property record. Building Department .NET aggregates all relevant data, including parcel data, in its file structure. Separate folders are provided to track Projects, Permits, PZE (Planning, Zoning, and Engineering) Processes, Code Enforcements, Certificates, Certificates of Occupancy, and Inspection Groups. Open any folder to view/manage the data. Pictures and documents, such as drawings, letters, etc., can be attached to nearly every record and easily viewed.

The screenshot displays the Building Department .NET application window. The title bar indicates the user is BSA, the database is Demonstration, the group is Parker, and the version is 03/15/2018. The interface includes a menu bar (File, View, Navigation, Tasks, Reports, Utilities, BS&A Applications, Help, Full Screen) and a toolbar with various icons for search, index, add, delete, audit, hide, print, tools, inspector's view, map, and names.

The main window is divided into several sections:

- Application Views:** A tree view on the left showing a hierarchy of folders: Property (Address, Miscellaneous, Attachments, Owner: BEARD GLENNA L REV TRUST, Taxpayer: BEARD GLENNA L REV TRUST), Projects, Permits, PZE Processes, Enforcements, Certificates, Certificates of Occupancy, Inspection Groups, Tables, GIS, and Program Setup.
- Property Information:** A central panel displaying details for property 1601 N MCEWAN ST, Parcel Number 051-027-400-16, owned by BEARD GLENNA L REV TRUST. It includes tabs for Property, Building, Rental, Comment, Cross Connects, and Parking Details. Fields include Occupant, Resp. Party, Subdivision, Year Built (1972), Lot, Block, Zoning (R2), Use Groups, Parking Spaces (0), and Occup. Load (0). There are also checkboxes for "Hide this property from Internet Services" and "Vacant".
- Parcel Information:** A tab at the bottom showing the owner as BEARD GLENNA L REV TRUST.
- Floor Plan:** A detailed architectural drawing of the property's interior, showing a Master Bedroom, two other Bedrooms, a Dining Room, Kitchen, Deck, and Garage. Closets and a staircase are also indicated.
- Site Map:** A map showing the property's location within a larger development. The map is color-coded by phase: PHASE I (green), PHASE IA (yellow), PHASE IB (orange), PHASE II (red), and FUTURE DEVELOPMENT (grey). A legend on the right side of the map identifies these phases.

The bottom of the window shows a status bar with "requests [0]", "Quick Invoice" button, "Test" button, and a notification icon with "[1]".

Building Department – Inspections

Inspectors can display a list of inspections, generate shortest route directions, view activities in a calendar, or display the property on a GIS map. Comprehensive checklists are provided to improve efficiency and consistency when flagging violations. Field tablets can be used to capture pictures.

The screenshot displays the 'Inspector's View' interface. At the top, there are navigation options for 'Inspections' and 'View Schedule'. A calendar for December 2017 is shown, with a pop-up window titled 'Appointment Details' for 'DAVE WILLIAMS' on December 17th. The appointment details include the inspector's name, type ('Footing Inspection for Permit PB17-008'), start and end times (8:00 AM to 9:00 AM), location ('13471 BLAISDELL DR, Clare, MI, 48617'), and comments ('Permit PB17-008').

Below the calendar, there is a table of inspections. The table has columns for 'Address', 'Inspector', 'Linked Record', 'Type', and 'Scheduled'. The data rows are as follows:

| Address | Inspector | Linked Record | Type | Scheduled |
|--------------------|---------------|---------------|---------|-----------|
| 13471 BLAISDELL DR | DAVE WILLIAMS | PB17-008 | Footing | 12:00 |
| 13471 BLAISDELL DR | BRUCE KEDEL | PW17-001 | Final | 12:00 |
| 13471 BLAISDELL DR | BRUCE KEDEL | PS17-001 | Final | 12:00 |
| 13471 BLAISDELL DR | DAVE WILLIAMS | PB17-008 | Final | 8:00 |
| 13471 BLAISDELL DR | DAVE WILLIAMS | PB17-008 | Footing | 8:00 |
| 13471 BLAISDELL DR | DAVE WILLIAMS | PB17-008 | Rough | 8:00 |

In the foreground, the 'Do Inspection' dialog box is open. It includes a 'Take Pictures' button and a 'Schedule Reinspection' button. Below these are fields for 'Building', 'Unit', and 'Area'. There is a checkbox for 'Location has NO violations' and a link to 'View all visited locations...'. The 'Inspection Checklist' section shows a table with columns for 'Checklist Categories', 'Failed', 'Passed', 'Title', and 'Description'. The categories listed are 'Accessory Structure (6)', 'Electrical', 'Exterior - Yard', and 'Exterior - House Zoning'. The 'Electrical' category is expanded, showing items like 'ILLEGAL WIRING', 'IMPROPER MATERIALS', 'OUTLETS - LOCATION', 'OVERHEAD LIGHTING', and 'WORK W/O PERMIT'. A photo of a wire being inspected is shown on the right side of the dialog box.

View data on screen in charts or graphs, or dump the data into Microsoft Excel for even more robust reporting.

The image displays three overlapping windows from a software application. The top window shows a pie chart titled "Violations by Violation Type" with a legend and data labels. The middle window shows a bar chart titled "Permits by Status" with a legend and data labels. The bottom window shows an Excel spreadsheet titled "Open Electrical Permits" with columns for Permit Number, Permit Type, and Address Display String.

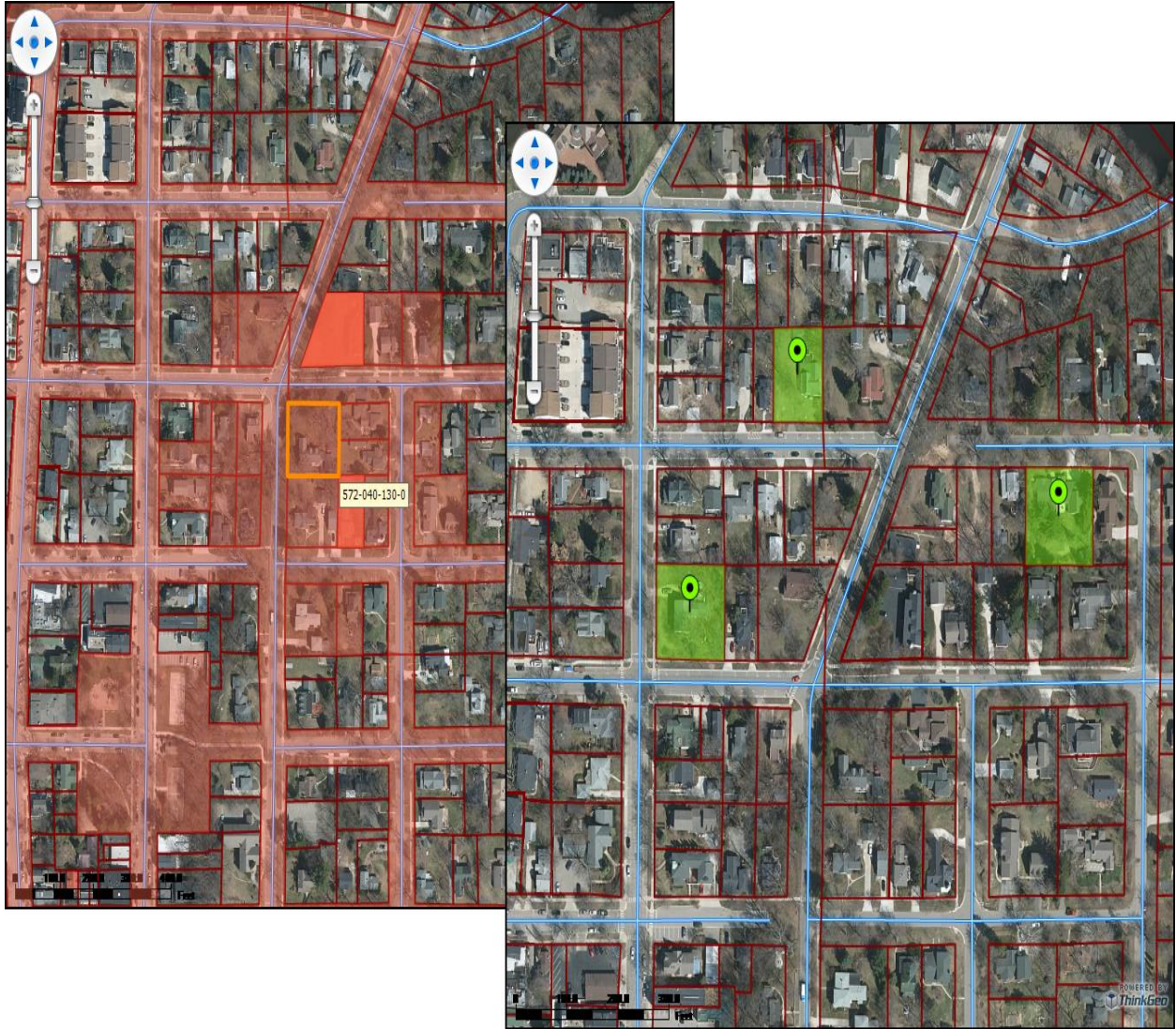
| Violation Type | Count | Percentage |
|--------------------------------|-------|------------|
| Elec Code | 24 | 19% |
| Building Code | 29 | 23% |
| Property Maintenance Ordinance | 13 | 10% |
| Health Hazard | 4 | 3% |
| Miscellaneous | 3 | 2% |
| Weeds & Tall Grass | 4 | 3% |
| Others | 5 | 4% |
| 18-290 | 3 | 2% |
| 18-287 | 3 | 2% |

| Status | Count |
|----------------|-------|
| READY TO ISSUE | 1000 |
| CLOSED | 1000 |
| HOLD (PERM) | 2000 |
| EXPIRES | 1000 |
| FINALES | 3000 |
| CANCELES | 100 |
| DENIES | 100 |
| ISSUES | 100 |

| Permit Number | Permit Type | Address Display String |
|---------------|-------------|------------------------|
| PE00-0290 | Electrical | |
| PE00-0351 | Electrical | |
| PE00-0882 | Electrical | |
| PE00-1159 | Electrical | |
| PE01-0290 | Electrical | |
| PE01-0697 | Electrical | |
| PE01-1084 | Electrical | |
| PE01-1085 | Electrical | |
| PE01-1086 | Electrical | |
| PE02-0007 | Electrical | |
| PE02-0114 | Electrical | |
| PE03-0319 | Electrical | |

GIS Integration

Building Department .NET can integrate with your existing GIS system to allow for visual analysis of your data, as compared to the spatial data from GIS. The image on the left is an example of a radius of parcels within 200 feet of the selected parcel – the parcel bordered in yellow. The image on the right is an example of all code enforcements filed within a specified date range.



Online Permit Applications

Permits and inspections can be requested through BS&A Online Services. The yellow text is specific to each jurisdiction.

Search: **All Records** ▾ By: **Address** ▾ Enter an address or address range such as 100-200 Main St Use Advanced Address Search

ONLINE SERVICES

- Internet Services
 - All Record Search
 - Assessing Search
 - Building Department Search
 - Current Tax Search
 - Property Sale Search
 - Special Assessment Search
 - Utility Billing Search
- Online Payments
 - Building Department Payments
 - Current Tax Payments
 - Utility Billing Payments
- Building Department
 - Apply for a Permit
 - Building Department Search
 - Schedule an Inspection
- Employee Self Service
 - Enter Employee Timesheets
 - My Time Sheet
 - Personal Employment Info
 - Personal Financial Info
 - Year To Date Info
 - Employee Documents

EMPLOYMENT OPPORTUNITIES

- All Employment Opportunities (Local)
- Search for Employment Opportunities

MUNICIPALITIES

- Select a Municipality

ACCOUNT

- Sign In
- Register
- Why Register?

Homeowner Application for Permit

Submit a permit application online. [Contractor Learn](#)

Thank you for using City of Novi Online Permit Application and Inspection Scheduling module! If you have any questions regarding this process, please call the City of Novi Community Development Department at 248-347-0415.

HOMEOWNER AFFIDAVIT

I hereby certify the permit work described on this permit application shall be installed by myself in my own home in which I am living or about to occupy. All work shall be installed in accordance with the State Plumbing Code and shall not be enclosed, covered up, or put into operation until it has been inspected and approved by the City Inspector. I will cooperate with the City Inspector and assume the responsibility to arrange for necessary inspections.

Section 23a of the state construction code act of 1972, 1972 PA 230, MCL 125.1523A, prohibits a person from conspiring to circumvent the licensing requirements of this state relating to persons who are to perform work on a residential building or a residential structure. Violators of section 23a are subjected to civil fines.

EXPIRATION OF PERMIT: A permit remains valid as long as work is progressing and inspections are requested and conducted. A permit shall become invalid if the authorized work is not commenced within six months after issuance of the permit or if the authorized work is suspended or abandoned for a period of six months after the time of commencing the work. A PERMIT WILL BE CLOSED WHEN NO INSPECTIONS ARE REQUESTED AND CONDUCTED WITHIN 180 DAYS OF THE DATE OF ISSUANCE OR THE DATE OF A PREVIOUS INSPECTION. CLOSED PERMITS CANNOT BE REFUNDED. THE CHARGE TO RE-OPEN A CLOSED PERMIT IS \$50.00

| | | | |
|--------------------------|-----------------------------|------------------------------------|----------------------|
| Select a Property | Enter Permit Details | Enter Applicant Information | Estimate Fees |
|--------------------------|-----------------------------|------------------------------------|----------------------|

Step 1: Select a Property

[Click here if you are a contractor](#)

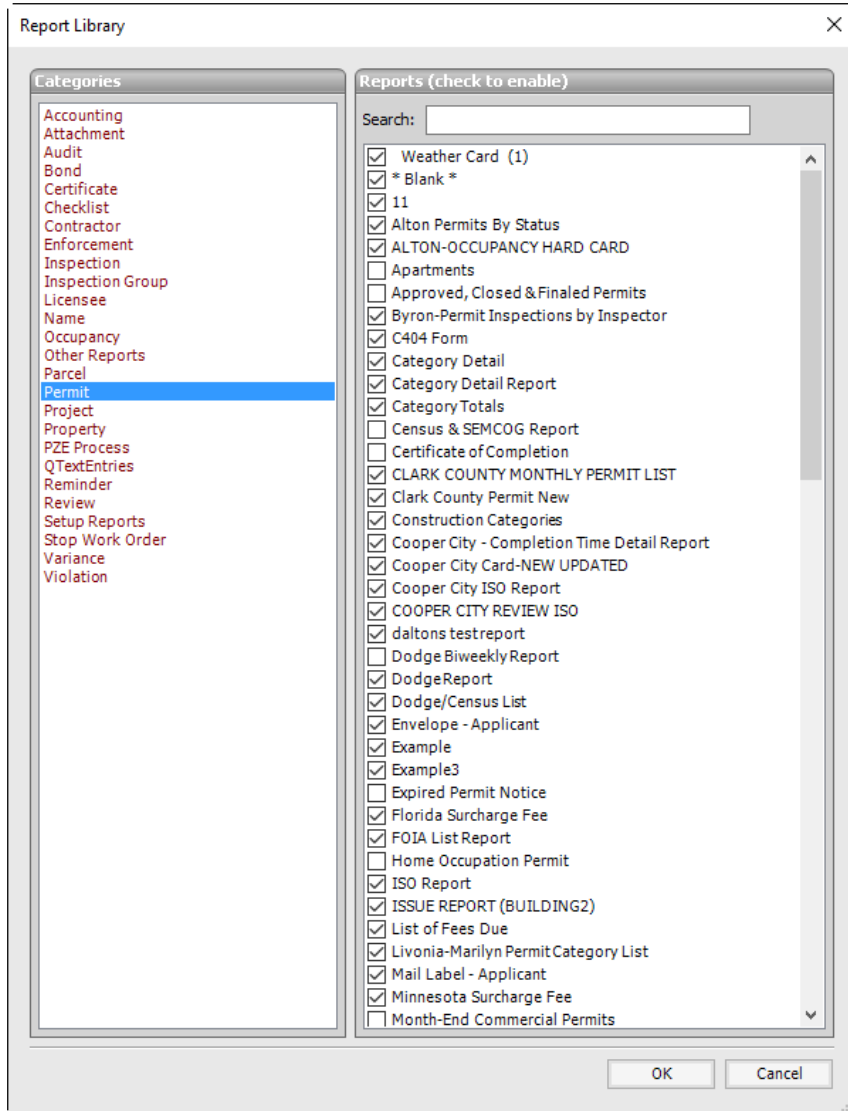
Property Search

Search By: ▾

Search For:

Report Library for Permits

Each category has many reports to choose from.

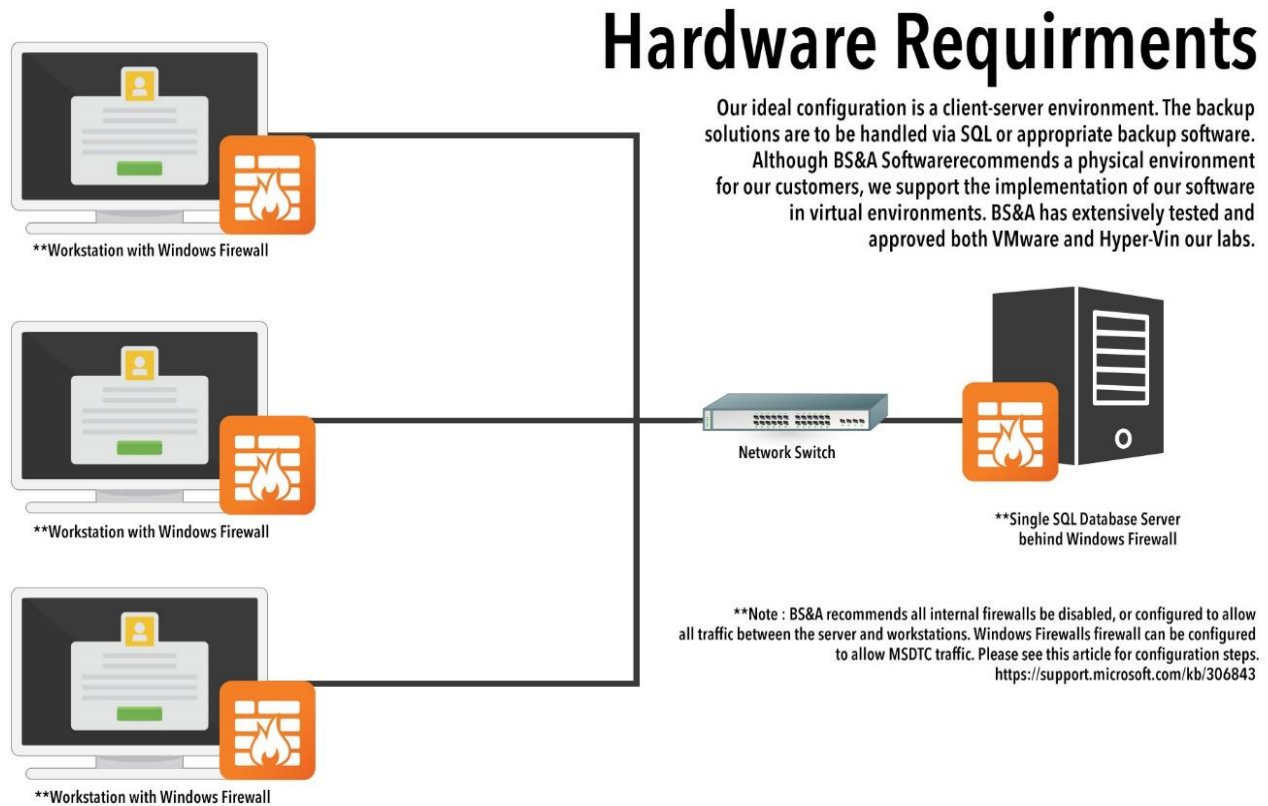


| Customer | County | Address | City | State | Zip | Contact | Phone | Converted From | Pervasive Since | .NET Since | Population |
|---|-----------|------------------------------|----------------------|-------|-------|---------------------|----------------------|---------------------|-----------------|------------|------------|
| Portage City | Kalamazoo | 7900 S. Westnedge Ave | Portage | MI | 49002 | Devin Mackinder | (269) 324-9217 | HTE | | 2014 | 44,897 |
| Armada Township | Macomb | 23121 E Main | Armada | MI | 48005 | Mary Swiacki | (586) 784-5200 | Quickbooks | | 2017 | 5,246 |
| Kalamazoo City | Kalamazoo | 241 W South St | Kalamazoo | MI | 49007 | Sue Hoch | 269 337-8840 | | | 2017 | 77,145 |
| Richmond City | Macomb | 68225 Main St | Richmond | MI | 48062 | Angel Hatfield | (586) 727-7571 | Fund Balance | | 2018 | 4,897 |
| Mt Clemens City | Macomb | 1 Crocker Blvd | Mt Clemens | MI | 48043 | Linda Kunath | (586) 469-6838 | Munis | | 2018 | 17,312 |
| Grosse Pointe Shores Village | Macomb | 795 Lake Shore Rd | Grosse Pointe Shores | MI | 48236 | Rhonda Ricketts | (313) 881-6565 | Fund Balance | | 2019 | 2957 |
| Alton City | Madison | 101 East Third Street | Alton | IL | 62002 | Jeannie Cowan | (618) 463-3544 | Pentamation | | 2016 | 27,290 |
| Norfolk City | Madison | 309 N. 5th Street | Norfolk | NE | 68701 | Leon Gentrup | (402) 844-2000 x2121 | AS400 | | 2014 | 23,516 |
| Palmetto City | Manatee | 516 8th Ave West | Palmetto | FL | 34221 | Cheryl Miller | (941) 723-4570 x7111 | American Data Group | | 2014 | 14,500 |
| Manistee County | Manistee | 415 3rd Street, Admin Office | Steele | MI | 49660 | Roger J. Elbers | (231) 398-3529 | Accucomp | 2005 | 2010 | 24,420 |
| Manistee City | Manistee | PO Box 358 | Manistee | MI | 49660 | Edward Bradford | (231) 723-2558 x 7 | Fund Balance | | 2017 | 6,586 |
| Onekama Township | Manistee | 5435 Main Street | Onekama | MI | 49675 | Michelle Johnson | (231) 889-3308 | Quickbooks | | 2017 | 1,514 |
| Belleview City | Marion | 5343 SE Abshier Blvd. | Belleview | FL | 34420 | Marge Strausbaugh | (352) 233-2117 | Asyst | | 2014 | 3,478 |
| Southport City | Marion | 6901 Derbyshire Rd | Southport | IN | 46227 | Diana Bossingham | (317) 786-3585 | Excel | | 2012 | 1,752 |
| Bennettsville City | Marlboro | 501 E. Main Street | Bennettsville | SC | 29512 | Rebekah Hayes | (843) 479-9001 | Harris | | 2017 | 8,833 |
| Powell Township | Marquette | PO Box 39 | Big Bay | MI | 49808 | Sara Drury | | Quickbooks | 2008 | 2009 | 724 |
| Marquette City | Marquette | 300 W. Baraga Ave | Marquette | MI | 49855 | Daniel Frederickson | (906) 225-4356 | GEMS | | 2012 | 20,714 |
| Ishpeming Township | Marquette | 1575 US 41 W | Ishpeming | MI | 49849 | Kristin Thornton | (906) 485-1210 x220 | Fund Balance | | 2014 | 3,522 |
| Marquette Charter Township | Marquette | 1000 Commerce Drive | Marquette | MI | 49855 | Dulcee Storch | (906) 228-6220 | Fund Balance | | 2014 | 3,286 |
| Kentwood City | Kent | PO Box 8848 | Kentwood | MI | 49518 | Tom Chase | (616) 554-0766 | New World | 2007 | 2009 | 45,255 |
| Marquette County Health Department | Marquette | 234 W. Baraga Ave | Marquette | MI | 49855 | Paul Carley | (906) 225-8472 | Harris | | 2014 | |
| Negaunee Township | Marquette | | | MI | | Tiffany Filbrandt | 906-475-7460 | Quickbooks | | 2019 | 2,707 |
| Chocolay Charter Township | Marquette | | | MI | | Suzanne Sundell | 906.249.1448 x207 | Fund Balance | | 2019 | 7,148 |
| Jupiter Island Town | Martin | 2 Bridge Road | Hobe Sound | FL | 33455 | Michael Ventura | (772) 545-0104 | Fund Balance | | 2017 | 850 |
| Ludington City | Mason | 400 S Harrison St | Ludington | MI | 49431 | Deborah Luskin | (231) 845-6237 | Versys | 2007 | 2009 | 8,357 |
| Mason County | Mason | 304 E Ludington Ave | Ludington | MI | 49431 | Timothy Hansen | (231) 843-8411 | Harris | 2003 | 2009 | 28,000 |
| Pere Marquette Charter Township | Mason | 1699 S Pere Marquette Hwy | Ludington | MI | 49431 | Joanne Kelley | (231) 845-1277 | Harris | 2005 | 2009 | 2,228 |
| Scottville City | Mason | 105 N. Main Street | Scottville | MI | 49454 | Amy Williams | (231) 757-4729 | Fund Balance | | 2018 | 1,266 |
| Sherman Township | Mason | 3566 N. Custer Rd | Scottville | MI | 49454 | Kurt Lubben | 231-462-3205 | Our Town | | 2018 | 1,090 |
| Fox River Grove Village | McHenry | 305 Illinois Street | Fox River Grove | IL | 60021 | Jennifer Menz | (847) 639-3170 | MSI | | 2014 | 4,753 |
| McHenry Township Fire Protection District | McHenry | 3610 W. Elm Street | McHenry | IL | 60050 | Marjean Diercks | (815) 385-0075 | AMS | | 2014 | |

| Customer | County | Address | City | State | Zip | Contact | Phone | Converted From | Pervasive Since | .NET Since | Population |
|-----------------------------|------------|------------------------------------|-----------------|-------|-------|-------------------------|----------------------|----------------------------|-----------------|------------|------------|
| Johnsburg Village | McHenry | 1515 Channel Beach Ave | Johnsburg | IL | 60051 | Kim Giovanni | (815) 385-6023 | MSI | | 2016 | 6,300 |
| Harvard City | McHenry | 201 W. Diggins | Harvard | IL | 60033 | Deb Szczap | 815-943-6468 x106 | MSI | | 2018 | 9,260 |
| Hutchinson City | McLeod | 111 Hassan St. SE | Hutchinson | MN | 55350 | Tom Kloss | (320) 234-4245 | Civic SQL | | 2015 | 13,929 |
| Hutchinson Utilities | McLeod | 111 Hassan St. SE | Hutchinson | MN | 55350 | Tom Kloss | (320) 234-4245 | LOGIS | | 2017 | |
| Big Rapids City | Mecosta | 226 N Michigan Ave | Big Rapids | MI | 49307 | Tim Moslener | (231) 592-4033 | Eden | | 2009 | 10,849 |
| Wyoming City | Kent | PO Box 905 | Wyoming | MI | 49509 | Andrea Boot | (616) 530-7282 | New World | | 2012 | 69,368 |
| Mecosta Township | Mecosta | 19729 11 Mile Rd | Big Rapids | MI | 49307 | Mary Quinlan | (231) 796-8935 | Peachtree | 2003 | 2012 | 2,435 |
| Barryton Village | Mecosta | PO Box 31 | Barryton | MI | 49305 | Jen Trelfa | (989) 382-7822 | Quickbooks | | 2014 | 381 |
| Big Rapids Charter Township | Mecosta | 14212 Northland Dr | Big Rapids | MI | 49307 | Sherri Gilbert | (231) 796-3603 | Resource | 2002 | 2014 | 4,208 |
| Stephenson City | Menominee | W628 Samuel St | Stephenson | MI | 49887 | Judy St. Juliana | (906) 753-6228 | CYMS | 2008 | 2010 | 875 |
| Menominee City | Menominee | 2511 10th St | Menominee | MI | 49858 | Kathy Brofka | (906) 863-1740 | Fund Balance | 2005 | 2012 | 9,131 |
| Spalding Township | Menominee | PO Box 161 | Powers | MI | 49874 | Jerry Bartnicki | (906) 497-5850 | Cogitate | | 2014 | 1,761 |
| Menominee County | Menominee | 839 10th Ave | Menominee | MI | 49858 | Brian Bousley | (906) 863-7779 | Pontem | | 2016 | 23,791 |
| Hooksett Town | Merrimack | 35 Main Street | Hooksett | NH | 03106 | Christine Soucie | (603) 485-2712 | BMSI | | 2013 | 13,451 |
| Biscayne Park Village | Miami-Dade | 640 NE 114th Street | Biscayne Park | FL | 33161 | Larry Spring | (305) 899-8000 | | | 2013 | 3,126 |
| EL Portal Village | Miami-Dade | 640 NE 114th Street | Biscayne Park | FL | 33161 | Larry Spring | (305) 899-8000 | | | 2013 | 2,380 |
| Medley Town | Miami-Dade | 7777 NW 72nd Avenue | Medley | FL | 33166 | Roy Danzinger | (305) 887-9541 x141 | Great Plains/MS ICommander | | 2016 | 842 |
| Lee Township | Midland | 1485 W. Olson Rd | Midland | MI | 48647 | Ron Rippee | (989) 832-2874 | | | 2014 | 4,411 |
| Jerome Township | Midland | 737 W. Beamish | Sanford | MI | 48657 | Angela Martin | (989) 488-4578 x3 | Fund Balance | | 2016 | 4,888 |
| Midland Charter Township | Midland | 1030 S. Poseyville Rd | Midland | MI | 48640 | Shelly Armstrong-Miller | (989) 835-8866 | Fund Balance | | 2017 | 2,297 |
| Water District No. 1 | Midland | PO Box 320 | Sanford | MI | 48657 | David Rothman | (989) 513-8491 | Quickbooks | | 2017 | |
| Grand Rapids City | Kent | 300 Monroe Ave NW Room 220 | Grand Rapids | MI | 49503 | John Globensky | (616) 456-3285 | | | 2016 | 197,800 |
| Brown Deer Village | Milwaukee | 4800 W Green Brook Drive | Brown Deer | WI | 53223 | Bridget Souffrant | (414) 371-3040 | Caselle | | 2012 | 11,715 |
| Glendale City | Milwaukee | 5909 north Milwaukee River Parkway | Glendale | WI | 53209 | Shawn Lanser | (414) 228-1717 | Caselle | | 2012 | 12,580 |
| Shorewood Village | Milwaukee | | | WI | | Cindy Wierzchowski | (414) 847-2602 | Banyon | | 2012 | 13,500 |
| Franklin City | Milwaukee | 9229 W. Loomis Road | Franklin | WI | 53132 | Paul Rotzenberg | (414) 427-7514 | ACS | | 2013 | 35,504 |
| Whitefish Bay Village | Milwaukee | 5300 N. Marlborough Drive | Whitefish Bay | WI | 53217 | Jen Amerell | (414) 755-6517 | Banyon | | 2013 | 14,109 |
| Greenfield City | Milwaukee | 7325 W. Forest Home Ave | Greenfield | WI | 53220 | Paula Schafer | (414) 329-5285 | HTE | | 2015 | 37,072 |
| Oak Creek City | Milwaukee | 8040 S. 6th Street | Oak Creek | WI | 53154 | Bridget Souffrant | (414) 768-6514 | MSI | | 2015 | 34,695 |
| South Milwaukee City | Milwaukee | 2424 15th Avenue | South Milwaukee | WI | 53172 | James Shelenske | (414) 768-7499 | Alio | | 2017 | 21,239 |
| Missaukee County | Missaukee | | | MI | | Susan Rogers | (231) 839-4961 x 242 | Accucomp | | 2012 | 15,051 |

Technical Requirements

Our ideal configuration is a client-server environment. The backup solutions are to be handled via SQL or appropriate backup software. Although BS&A Software recommends a physical environment for our customers, we support the implementation of our software in virtual environments. BS&A has extensively tested and approved both VMware and Hyper-V in our labs.



BS&A desires that all of our customers have a pleasant experience running our software. A properly configured Virtual Server need not destroy employee productivity. In order to ensure the best possible overall performance system, administrators must be willing to allocate sufficient resources to Microsoft SQL. To that end, BS&A Software recommends the following when implementing the .NET software in VM environments:

- 1) Databases and log files are kept on separate physical volumes/disks
- 2) Volumes housing databases and/or log files are dedicated to the use of the database (no other VMs reside on those volumes)
- 3) High performance disk technologies are used wherever possible
- 4) Disparate database styles (i.e., MS Exchange) NEVER cohabitate with MSSQL on the same drives
- 5) VMWare RDMs are implemented wherever possible
- 6) Parent servers dedicate at least 2 CPU cores to MSSQL VMs
- 7) Sufficient RAM is allocated to reduce/minimize the need for excessive disk access
- 8) SQL 2008 or newer only; Workgroup or Standard Edition where possible
- 9) So-called snapshots of the virtual machine cannot be relied upon for data restoration or disaster recovery. Alternative database backup methods must be employed.
- 10) Optimize disk partitioning using industry-standard methods

Supported Operating System (Workstation)

Windows 10, Windows 8.1 and Windows 8

Supported Server Operating Systems

Windows Server 2012 - 2019

Supported Versions of SQL

Windows Server 2008 - 2017

Microsoft SQL

Database schema for BS&A does not include views. All views are created programmatically at runtime of the application. All columns in the view are able to be sorted. All tables are able to be indexed by the user. This gives better functionality for a non-technical user than a standard view. SQL table schema for BS&A tables utilizes unique keys and indexes.

Reporting Services

BS&A's applications come with a large amount of reports offering numerous options so our users can quickly get the most out of our software. However, our integrated Report Designer allows users the ability to create their own reports as needed.

Key features:

- Streamlined capabilities with calculated expressions
- A Table option, which allows columns of fields on a report for ease in field placement and movement
- "Sort" banners and footers, which group data and can provide subtotals
- Clickable reports let you click on a particular report entry to drill down to the details
- Reports can be saved to PDF format and CSV format
- Same look and feel as Crystal Reports
- Our Report Profiles feature lets users group multiple reports together for more efficient printing. Individual reports within the profile have options that can be set and saved for the Profile process.

| Personal Computer Specifications | |
|---|---|
| Workstation | |
| Recommended | Minimum |
| 3.2 GHz Intel® Core™ i5 (or faster) | 2.8 GHz Intel® Core™ i3 |
| 8 GB RAM | 4 GB RAM |
| 80 GB free disk space | 40 GB free disk space |
| Windows 10 (Professional or above) | Windows 7 (Professional 64-bit or 32-bit) |
| Tablet PC (Community Development Field Inspection App) | |
| Recommended | Minimum |
| Intel® Core™ i5 520 UM (or faster) | 2.8 GHz Intel® Core™ i3 |
| 8 GB RAM | 4 GB RAM |
| 80 GB free disk space* | 40 GB free disk space* |
| Windows 10 (Professional or above)** | Windows 7 (Professional 64-bit or 32-bit) |
| *Note: The amount of free disk space required is dependent upon the size of the database and the number of attachments required | |
| **Note: BS&A applications are NOT compatible with Windows RT | |

| Server Specifications | |
|---|--|
| (defined as a computer running a Windows Server Operating System) | |
| Database Server (fewer than 15) | |
| Recommended | Minimum |
| 1 Xeon E5 series Quad-Core 2.4 GHz (or faster) | 2 GHz Multi-Core Xeon Processor |
| 8 GB RAM | 4 GB RAM |
| 6x SATA 7.5K RPM 1TB (3x RAID 1) | 250 GB free disk space |
| Separate RAID for Operating System | Windows Server 2008 Standard (32-bit) |
| Windows Server 2016 (Essentials or above) | |
| Database Server (15 to 30 Users) | |
| Recommended | Minimum |
| 1 Xeon 2.3 GHz E5 Six-Core Processor (or faster) | Xeon 2 GHz Multi-Core Xeon Processor |
| 24 GB RAM | 16 GB RAM |
| 4x SATA 7.5K RPM 1TB (2x RAID 1) | 500 GB free disk space |
| 2x 500 GB Solid State Drive (SSD) | Windows Server 2008 Standard (64-bit) Separate RAID for Operating System |
| Windows Server 2016 (Essentials or above) | |
| Database Server (30 to 50 Users) | |
| Recommended | Minimum |
| (2) Xeon 2.5 GHz E5 Six-Core Processors (or faster) | Xeon 2.8 GHz Quad-Core Processor |
| 48 GB RAM (DDR3 1333 or faster) | 24 GB RAM |
| 4x 10K RPM SAS 1TB Hard Disks (2x RAID 1) | 1 TB free disk space |
| 2x 500GB Solid State Drive (SSD) | Windows Server 2008 Standard (64-bit) Separate RAID for Operating System |
| Windows Server 2016 (Essentials or above) | |
| Database Server (50 to 100 Users) | |
| Recommended | Minimum |
| (2) Xeon 2.5 GHz E5 Eight-Core Processors (or faster) | (2) Xeon 2.8 GHz Quad-Core Processors |
| 64 GB RAM (DDR3 1600 or faster) | 48 GB RAM |
| 8x SATA 15K RPM 1TB (2x RAID 10) | 1 TB free disk space |
| 2x 500GB Solid State Drive (SSD) | Windows Server 2008 Standard (64-bit) |
| Separate RAID for Operating System | |
| Windows Server 2016 (Essentials or above) | |
| Server (over 100 users) | |
| Please email our IT Department at ITSupport@bsasoftware.com | |
| Virtual Server | |
| Please see the help doc entitled "BS&A Software and Best Practices in Virtual Environments." http://bsasoftware.com/references/whitepapers_helpdocs/tech/articles_whitepapers/White_vmSupport.pdf | |
| Terminal Services/Citrix Environments | |
| Recommended Application Server Specifications | |
| Dual Quad-Core Xeon Processor | |
| 4096 MB RAM plus an additional 1024 MB RAM per user, per application | |
| 500 GB free disk space | |
| Windows Server 2016 (Essentials or above) | |

Limit of 50 total users

Please see the help doc entitled "BS&A Software and Best Practices in Terminal Server/RDP Environments."
http://bsasoftware.com/references/whitepapers_helpdocs/tech/articles_whitepapers/white_terminallimits.pdf

Please see the help doc entitled "BS&A Software and Remote Desktop Services 2016"
http://bsasoftware.com/references/whitepapers_helpdocs/tech/articles_whitepapers/remotedesktopservices2016.pdf

I.T. Recommendation

BS&A has worked with IT Right for network services and implementation since 1999. If you are in need of IT services, please visit their site: <http://www.itright.com>

Printer Recommendations

BS&A Software does not officially maintain a master list of all the different printers that work with our applications. A general rule of thumb would be that any printers that are compatible with Windows are also compatible with BS&A.

Finance Department
 Fifty Raupp Blvd.
 Buffalo Grove, IL 60089-2198
 Phone 847-459-2525
 Fax 847-459-7906

Community Development Software Addendum #1

TO: Prospective Respondents and Other Interested Parties

FROM: Village of Buffalo Grove Finance Department

ISSUE DATE: January 24, 2020

SUBJECT: ADDENDUM #1

Note: This Addendum is hereby declared a part of the original RFP documents and in case of conflict, the provisions in the following Addendum shall govern.

The following changes and clarifications shall be made to the RFP Documents for the Community Development software project.

Q1: Does the City leverage an existing payment processing vendor and if so, who? Does the City accept credit card at the counter and if so, what devices are used to swipe credit cards. What payment provider being leveraged?

A1: Paymentus

Q2: What format is the data from New World in and can the City please estimate the amount of historical permits they expect to migrate? How many years has the City been using New World? Has the City identify what information is to be converted from New World into the new solution

A2: The data from New World is in a SQL Database. NWS was implemented on March 1, 2015 for permits and October, 2014 for licensing. To this date we have approximately 10,000 historic permit data in NWS. The Village is seeking Historical data to be brought into the new system.

Q3: For how many years would the City like the 40 hours of included consulting hours?

A3: Every calendar year for the duration of the agreement.

Q4: The City has an implementation timeline of 6 months, what is driving this timeline? IE, is there a drop dead date for funding or is the current system being de-supported? Is the Village open to proposals that list an alternative timeline?

A4: The Village seeks to complete this project during the 2020 Budget year. While the Village may consider alternate project schedules, an explanation as to why the schedule in the original RFP document is not feasible must be included in your proposal response.

Q5: Can the City provide sample complaint/violations as well as Zoning and Planning projects/applications? What types of complaints is the Village looking to manage in a new system?

A5: The new system will manage the Property Maintenance, more information on the violations can be found [here](#).

Q6: Can the Village describe the use case(s) for integrating with Office and Outlook?

A6: Integration with the outlook calendar is a key component of seamless operations for the Village.

Q7: Would the Village be open to 5 year term rather if there to be realized benefits to the Village?

A7: Please respond to the term as written in the proposal.

Q8: Referring to Laserfiche...is this used to store documents from all applications, or only those that are archived (i.e. storing final application documents for historical purposes)?

A8: Laserfiche is typically used to store final documents for historical purposes

Q9: How many Village staff are involved in processing licenses issued by the Village? How many code enforcement officers / inspectors are out in the field? How many field inspectors require offline inspection capability? How many users will need access to mobile inspections? How many users will need access to GIS? Can you please specify the amounts of users anticipated for licensing, planning and permitting usage?

A9: Please see I. Description and Scope of Work (page9) Please include a breakdown of user license costs.

Q10: Will the Village continuing using Accela CRM? Can you please share your plans as to how the Village plans to proceed with Accela's CRM? Will a new CRM solution need to be proposed as part of this RFP and if so, for how many users

A10: The Village will entertain other solutions as part of this proposal, however any proposed solution must integrate with software currently in use by the Village.

Q11: Does the Village have external users with other agencies involved in plans review? If so, how many?

A11: The Village presently uses an external agency for fire plan review. The Village may use an external agency for plan review in other areas in the future.

Q12: Could we please get samples of permit/license applications and forms the Village will want to incorporate in the new system?

A12: Link to permits and license application can be found [here](#).

Q13: Can the Village please provide a complete list of all integrations required for the new solution?

A13: Please review Scope of Services – Description of Work – Item 10. Integration and Migration

Q14: Did the Village evaluate solutions that could meet its requirements through vendor demonstrations leading up to the RFP release?

- a. If so, what types and names of solutions and vendors were evaluated (vendor-hosted and on-premise)?

A14: No evaluations have taken place to date. The Village did seek demonstrations from Accela, Citizenserve, EnerGov, IWorq, and BSnA.

Q15: Did the Village use any vendor(s) to help develop the RFP?

A15: No

Prospective respondents are to acknowledge receipt of Addendum #1.

Include and note this Addendum in your response.

RESPONDENT: BS&A Software

SIGNED:  _____ DATE: 2/5/2020

TITLE : Account Executive

Exhibit C.
Proposal Response Documents “Implementation Schedule”
pg1

The following Implementation Schedule details the overall implementation timeframe and schedule of events. The dates, times and order of events are subject to change based on availability of the Village and BS&A staff. This schedule will be further refined at the kick-off meeting. BS&A guarantees that the system will be fully functional according to the completion document once finalized at the commencement of the project.

| Task | Responsible Parties (Bold is Primary) | Start Date | Duration |
|--|--|------------------------|-----------------|
| Initiation Activities | | | |
| Conduct Kick-off Meeting | BS&A and Village | 1/8/2021 | 1 day |
| Review Project Scope and Project Management Process | BS&A | 1/8/2021 | 1 day |
| Establish Project Meeting Schedule | BS&A and Village | 1/8/2021 | 1 day |
| Assemble BS&A Project Team | BS&A | 1/25/2021 | 1 day |
| Assemble Village Project Team | Village | 1/25/2021 | 1 day |
| Create Initial Project Timeline | BS&A & Village | 1/25/2021 | 1 day |
| IT and Data Conversion Activities | | | |
| Meet with Village IT Staff to review Hardware Configurations | BS&A and Village | 5 months pre go-live | 1 day |
| Extract Preliminary Data from current System | BS&A and Village | 5 months pre go-live | 1 week |
| Conduct Data Mapping and Develop Data Conversion Routines | BS&A | 5 months pre go-live | 1 month |
| Conduct Review of Converted Data with Village | BS&A and Village | 4 months pre go-live | Approx. 1 day |
| Install Programs | BS&A | 4 months pre go-live | 1 day |
| Knowledge Transfer | | | |
| Conduct On-site Process Review Meeting | BS&A and Village | 3 months pre go-live | 2 days |
| Conduct Analysis of Current Forms | BS&A and Village | 3 months pre go-live | 1 day |
| Conduct Review of Required Reports | BS&A and Village | 3 months pre go-live | 1 day |
| Conduct Analysis of System Interface Requirements | BS&A and Village | 3 months pre go-live | 1 day |
| Develop Best Practices Recommendation | BS&A | 3 months pre go-live | 1 day |
| Approve Recommendations | Village | 3 months pre go-live | 1 day |
| Implementation | | | |
| Create Forms | BS&A | 0-2 months pre go-live | 2 days |
| Create Reports | BS&A | 0-2 months pre go-live | 2 days |
| Conduct Acceptance Testing | Village | 0-2 months pre go-live | 2- 14 days |
| Conduct Final Data Extraction | Village | 1 week pre go-live | 2 days |
| Convert Final Data | BS&A | 1 week pre go-live | 2 days |

| | | | |
|--|-----------------------------|------------------------|--------|
| On-site Set-up for Users & Configuration Items | BS&A | 0-1 month pre go-live | 4 days |
| Training | | | |
| On-site Training | BS&A and Village | 0-2 months pre go-live | Varies |
| Post-Project Activities | | | |
| Conduct Post Project Review & Assessment | BS&A and Village | 1 month post go-live | Varies |
| Conduct Post Implementation Follow Up Training | BS&A and Village | TBD | TBD |