Proposal for City of Calistoga, California

Electronic Permit Tracking System

June 19, 2015

Prepared by
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LETTER OF TRANSMITTAL

June 19, 2015

Lynn Goldberg
Planning and Building Director
City of Calistoga
1232 Washington Street
Calistoga, CA 94515

Ms. Goldberg,

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

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

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

Citizenserve is already up and running with thousands of users. We simply need to add your users to the software and configure your implementation with your permit types, applications, fees, violation types, letters, etc. Citizenserve pricing is based on an annual subscription per named user. The number of users can be increased or decreased at any time. The subscription includes all components, all features and unlimited support. The annual cost is $1,500 per user per year. A onetime setup cost which includes setup, configuration, project management and online training is $600 per user. For 11 users the annual subscription is $16,500 and onetime setup/training is $6,600. Because Citizenserve comes with unlimited customer support there are no surprises. Need a new report, its included! Need to change your setup after going live, its included! Need training for a new staff member, its included!

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

Sincerely,

Jim Garvey

Manager

Online Solutions, LLC

1101 E Warner Rd Suite 160

Tempe, AZ 85284

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EXECUTIVE SUMMARY

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

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

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

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

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

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

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

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

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

Records Management: Tracking of physical plans and routing can be setup in the activities of Citizenserve.

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

Public Online Application Submittal and Inquiry Capabilities: The Citizenserve citizen access portal is a configurable and customizable solution that allows citizens, contractors and businesses to participate electronically in the process of permitting, licensing, code enforcement, inspections and requests. Your constituents can apply online, pay online, upload documents, send messages, schedule inspections, request services and get information.

Mobility-In Field Usage: Citizenserve is fully functional in the field. There is no designation between desktop or tablet users. Citizenserve uses a device and browser independent architecture. There is no software required on the local desktop or device.

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

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

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

Company Name: Online Solutions, LLC (DBA Citizenserve)

Address: 1101 E Warner Rd, Suite 160

                         Tempe, AZ 85284

Telephone Number: 800-325-9818 x703

Fax Number: 800-325-9818

E-mail Address: jim@citizenserve.com

Point of Contact: Jim Garvey

Binding Authority: Jim Garvey

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

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

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

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

Contact information for the State of Florida: Mike Burns, mike.burns@myfloridacfo.com , 850-413-3614.

Project Management is a critical component of all implementations performed by Citizenserve. Our projects are successful because of our attention to detail and execution of all areas related to the project. With all of our projects you will see a consistent methodology including the following elements, initial planning, creation of a project work plan, institution of project management procedures, management of scope and management of risks. We use web conferencing during implementation, training and for support. This allows us to provide significantly more qualified resources on projects and to provide for resource continuity that would be impossible otherwise. In other words, the people working on your implementation and training will be the people you work with for support. This is critical in complex permitting, licensing and inspection processes.

Citizenserve is a private company and is debt and investor free. The company has been profitable for the last 8 years and has never had a litigation or dispute. We keep things simple so we can focus on our customers.

The following Citizenserve staff will be assigned to the project:

Daniel Burt – Citizenserve Engagement Manager

Dan has a degree from Arizona State University in Public Policy. Dan has recently led implementations with St. Charles County Missouri, Hot Springs Village Arkansas and Prattville Alabama. Dan will be responsible for implementation and will also be the lead on training and support.

Syama Pisapati – Citizenserve Engineer

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

Ray Barker – Project Manager

Ray Barker is an experienced IT executive and has acted as the central resource for sales, marketing, product development, and product support in the education and government industry. Ray certified as a Project Management Professional (PMP #1647672) in July of 2013 and is working toward his Program Management Professional (PgMP) certification. Ray is currently an Account Manager with Citizenserve. He serves as the interface between customer service and existing Citizenserve customers. He manages relationships with Citizenserve customers in order to ensure their continued success in using Citizenserve for their community development needs. Before coming to Citizenserve, Ray was the Vice President of Academic Technology at Education Management Corporation (EDMC). At EDMC, Ray manages the Student Success Portfolio of Services for the 140,000 students represented with Argosy University, South University, The Art Institutes, and Brown Mackie Colleges. In addition, Ray has held the Chief Executive Officer role for two software companies serving the higher education industry. At

rSmart, Ray executed the strategic and tactical growth plans for this early stage, open source, application software provider. He executed fundraising efforts to ensure the company's continuing success by presenting the company's ongoing strategic product/market vision and operating business plan to venture funds.   In this role, he closed a $1.8M investment round of funding. For UNICON, a leading provider of enterprise portal and learning management systems, Ray executed the company's turnaround strategy encompassing the transformation from a service provider to a product company and the acquisition of an established competitor. UNICON supported over 450,000 students in 10,000 higher education institutions.

EXPERIENCE

Citizenserve was launched in 2003 as an internet software service. Our team developed numerous large custom software systems for local governments in the 1990s using client server technology. In the late 1990s we began developing internet applications for companies like Honeywell and American Express. We took the local government experience and internet development capabilities and created Citizenserve.

We have over 200 customers and thousands of end users and offer unlimited support to all customers. As a result our staff is more intimately involved in complex permitting and licensing processes than a traditional software development firm might be.

Spanish Fork City, Utah
Dave Anderson
Director of Community Development
801-804-4586
danderson@spanishfork.org

City of Pismo Beach, California
Jon Biggs
Community Development Director
805-773-7089
jbiggs@pismobeach.org

City of Evans, Colorado
N. Zach Ratkai
Community Development Manager
970-475-1111
zratkai@evanscolorado.gov

Oconee County, South Carolina
David Stokes
Director of Community Development
864-364-5103
dstokes@oconeesc.com

St. Charles County, Missouri
Patty Steevens
Business Applications Manager
Information Systems
636-949-7900 x4488
psteevens@sccmo.org

City of Gulf Shores, Alabama
Shana Edmond
IT Systems Administrator
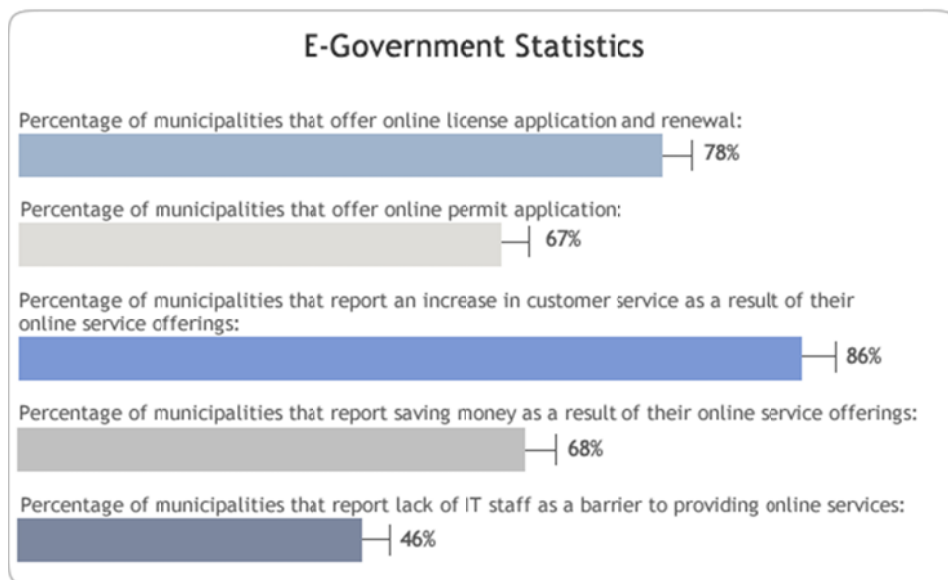251-968-1130
sedmond@gulfshoresal.gov

City of Calistoga, California	PROJECT PLAN	
Phase/Task	Responsible Parties	Duration

Planning
    Define/Document all processes
    Identify all forms, notices, standard letters
    Identify all information required for setup
    Identify workflow routes
    Identify and refine gaps in current
    processes/policies
    Define user accounts and security rights
    Define integration requirements and gather data sources
	**Citizenserve Engagement Manager,
	Client Team**
		4 week

System Setup and Configuration
    Document integration specifications
    Define data migration specifications
    Setup basic installation
    Setup forms, notices letters
    Setup user accounts and rights
    System setup / configuration
    Create data migration programs
    Create integration programs
	**Citizenserve Engagement Manager
	and Engineer**
		4 weeks

System Readiness
    Review system setup configuration
    Refine configuration as needed
	**Citizenserve Engagement Manager,
	Client Team**
		2 weeks

Training
    Online training for basic users
    Online training for system administrators
	All	2 weeks

Implementation
    Go live
    Supplemental online training as needed
    System monitoring and adjusting as needed
	All	

Total Implementation Duration		12 weeks

SOFTWARE DESCRIPTON

With citizenserve® cloud computing you have access to fast, secure, leading edge technologies at a low cost. The citizenserve cloud was initially launched in 2002, and currently has processed over a billion transactions. Over the last 13 years the citizenserve cloud has had no data loss, no security breaches, and has maintained 99.9% system uptime.

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

E-Government Statistics

Percentage of municipalities that offer online license application and renewal: 78%

Percentage of municipalities that offer online permit application: 67%

Percentage of municipalities that report an increase in customer service as a result of their online service offerings: 86%

Percentage of municipalities that report saving money as a result of their online service offerings: 68%

Percentage of municipalities that report lack of IT staff as a barrier to providing online services: 46%

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

FEATURES

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

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

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

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

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

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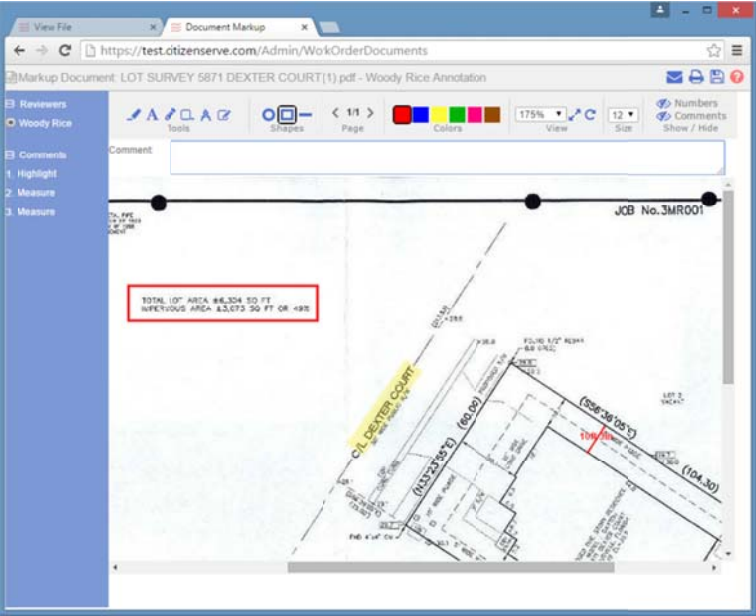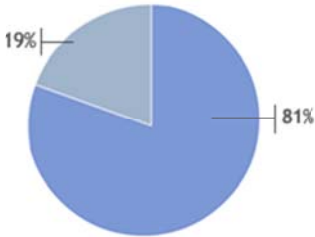
-Town of Duck

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

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

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

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.
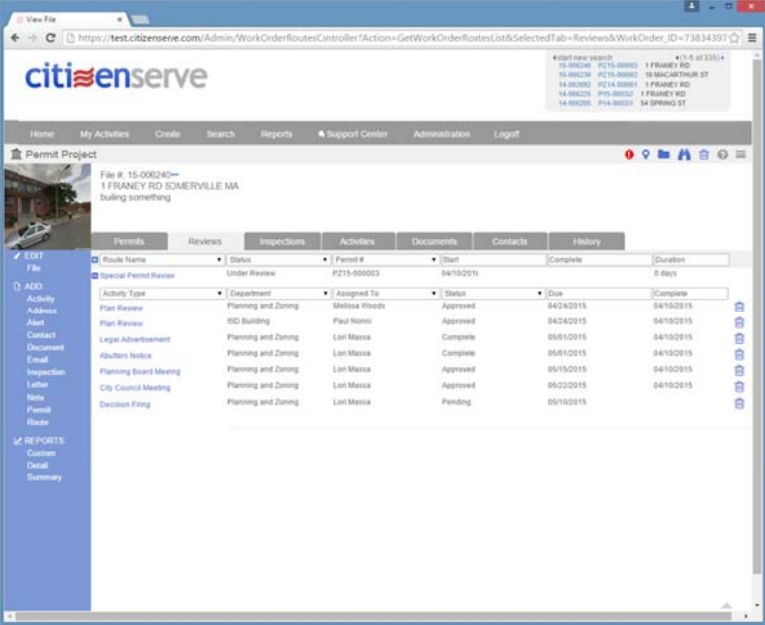
Citizenserve planning and zoning software completely automates the process of application, review, routing, resubmittals, and public notification.

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

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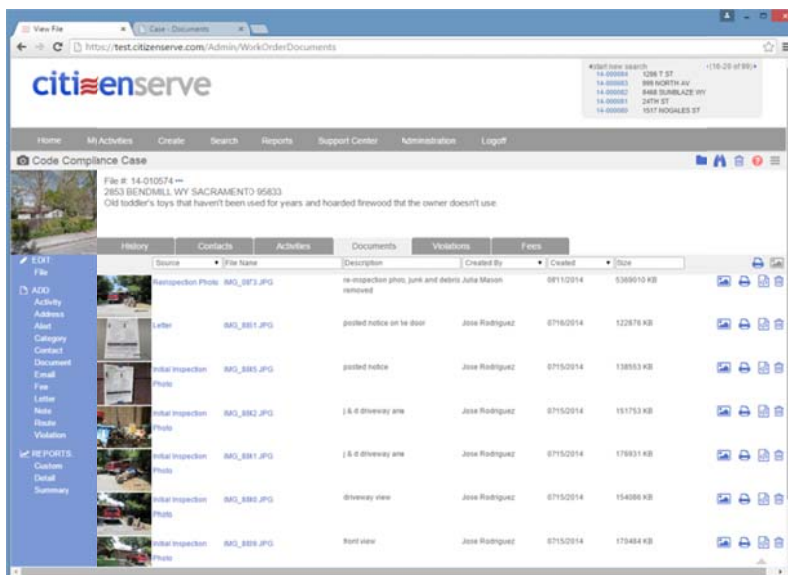
-City of Lewiston

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

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

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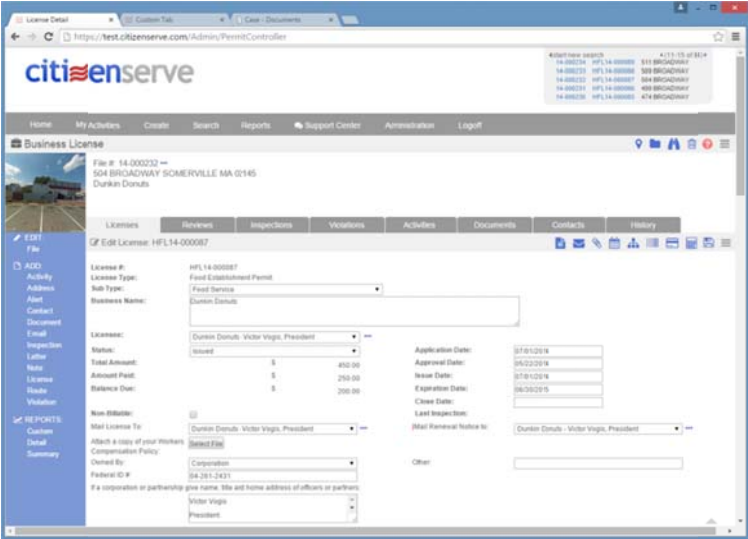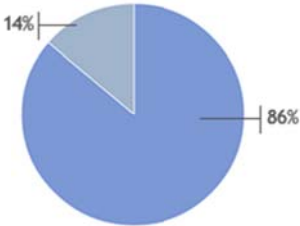>
> -City of Boulder

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

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

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

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal make up more than 85% total business license applications.
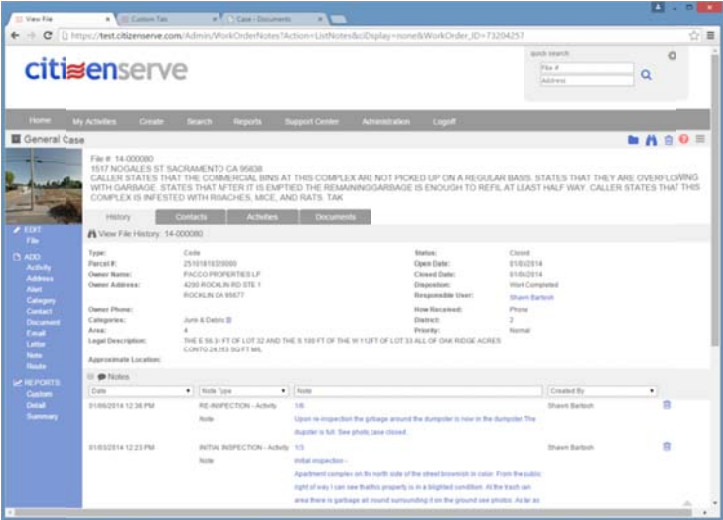
Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests.

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

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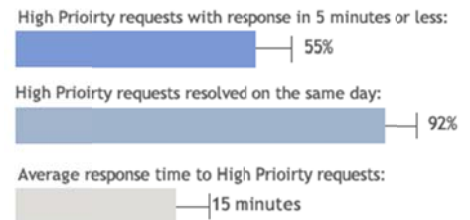
-City of Sacramento

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

Concierge Program Statistics

High Prioirty requests with response in 5 minutes or less:
55%

High Prioirty requests resolved on the same day:
92%

Average response time to High Prioirty requests:
15 minutes

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

-Wood County

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

-City of Athens

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

-City of Oviedo

STANDARD PRICING

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

User Subscription Fees	
Number of Users	Annual Fee per User
1 – 10	$1,800
11 – 25	$1,500
26 – 50	$1,200
50 or more	$900
One-Time Initial Fees	
Service	Fee per User
Training	$200
Setup and Configuration	$300
Project Management	$100
Data Migration*	varies
Systems Integration*	varies

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

TECHNICAL REQUIREMENTS

Citizenserve is an internet based software subscription. No server hardware or software is required to use Citizenserve. Citizenserve works on all contemporary browsers. For security reasons we recommend current versions of the major browsers, Internet Explorer, Safari, Chrome or Firefox. The unlimited support that comes with the subscription includes resolving browser configuration issues and sometimes desktop support if necessary. The application is HTML5 and JavaScript and does not require any applications be loaded locally on the desktop or device.

Citizenserve started 12 years ago running on a Java application server with a middle tier of Enterprise Java Beans using a back end database of Microsoft SQL Server. This is the same technology we use today although we incorporate much more JavaScript and HTML5 today as the current browser technology richly supports these features. Since we offer unlimited support to end users and technical staff we are motivated to keep the application easy to use and focus on usability. Our customers can submit support requests for new features and functionality. Updates containing new features and any fixes are rolled out twice a month.

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

Attachment A – Requirements Matrix

Please complete the following Requirement Matrix to assist the City in determining an appropriate vendor. Place an "X" in the column that best describes your solution according to the legend below. If additional comments are necessary in conveying features, please use the Comments column for additional details. If information is contained in the proposal, only the proposal page number need be given.

Legend for completing the following requirements

S = Standard functionality out-of-the-box

M = Modification required (i.e., standard script or other work around)

C = Customization to the base code/API required

N = Not able to provide this feature

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Requirements	S	M	C	N	Comments
General Functionality					
1. System is Windows, SQL compatible and browser-based.	X				
2. Encryption is used for client access.	X				
3. Web applications development address PCI. Example: tested against OWASP standards	X				
4. Application can be virtualized.	X				
5. Users can select from different displays to personalize their own screens.	X				
6. A real-time dashboard displays dynamic charts & graphs that the user wants to view.	X				
7. Emails from Microsoft Outlook can be viewed directly within the system.	X				
8. Automatic email notification is provided to users when assigned activities have been updated or new tasks have been assigned to them.	X				
9. User-defined security, differential rights distribution, role designation, and user options are provided. Detailed audit trails for security management changes are provided.	X				
10. Detailed audit trails/reports are provided for financial activity. The ability to integrate or batch cash receipts and miscellaneous billing to MOM financial system (Calistoga's existing financial system) is provided.	X				
11. The system provides user- defined security, differential rights distribution, role design-nation, and user options.	X				
12. The system provides a configurable, flexible workflow management system to automate business processes performed by each department and agency involved with the development and business license review process.	X				
13. Permit, project, code violation, and complaint types can be assigned to specific departments.	X				
14. Workflow can be customized according to our business processes.	X				
15. Active Directory is utilized for logins.				X	
16. The ability to notate, with specific categories, when a permit or record is not associated with a property owner (PG&E, CAL Water, AT&T, etc.)	X				
Permit Applications					
1. Ability to validate the address and APN in City's GIS database or Assessor's records when initializing permit application. If address cannot be verified, system should give option to allow address by exception for validation prior to issuance of permit.	X				
2. Ability to support multiple (unlimited) parcels and addresses for each project.	X				
3. Ability to list all open or expired permits and permit applications during permit initializing process.	X				
4. Ability to track multiple applications to single	X				

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master project and the ability to link records together creating parent-child relationships.				
5. Ability to auto populate and identify hazard zone information (i.e., flood, WUI, seismic/liquefaction hazard zones, /historic structures, protected trees, covenants, etc. based on address or APN).	X			
6. Ability to list any Warnings, Locks, Holds, Notices or Restrictions for parcel during permit initializing process.	X			
7. Ability to add additional permit types as needed.	X			
8. Ability to duplicate part or all of the data from one permit record to another.	X			
9. Ability to attach associated documentation to a permit or parcel record (Pic. files, PDF, Word, Excel, Powerpoint/Keynote, etc.).	X			
10. Ability to review permit information even if the permit is closed or expired without having to change status to "active"	X			
11. Ability to restrict the issuance of permits for certain parcels based on access authority (e.g., holds are placed on certain permits, parcel may require approval by Planning Director or Building Official).	X			
12. Track contact information of contractors, applicants, property owners, etc.	X			
13. Ability to look up contractor information on Contractors State License Board website to check validity of license.	X			
14. Automated response to applicant when all comments are ready for viewing.	X			
15. Restrict resubmittal of plans until all comments are submitted to system and automated response is sent to applicant.	X			
16. Ability to view historical permit data such as floor area or valuation within a certain date range issued for a particular structure	X			
17. Program should Ability to generate recurring inspection requests and generate task for developments requiring periodic inspections after acceptance.	X			
18. Ability to calculate permit fees based on a fee schedule.	X			
19. Ability to automate fees based on permit type and sub-types.	X			
20. Ability to increase a batch of selected fees based on a percentage basis.	X			
21. Ability to identify if fees have been paid, including one-time fees	X			
22. Ability to track plan review deposit balances, bonds, and insurance information	X			
23. Ability to link multiple permits to one bond	X			
24. Ability to schedule bond releases based on Council acceptance or inspector approval depending on	X			

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scope of work.				
25. Ability to route electronic plans and other electronic documents to unlimited departments and agencies	X			
26. Ability to define project timelines and schedule project milestones in a single module/screen.	X			
27. Ability to print cover sheet with permit card to show/list all locks, holds, warnings & restrictions.	X			
28. Ability to track the physical location of plans.	X			
29. Ability to send out notification letters 30 days prior to the expiration of the application.	X			
30. Ability to expire permits if no action is taken prior to the expiration date of the application and send out letters to notify applicants of the expired status.	X			
Plan Review				
1. Ability to track plan review by selected fields (address, APN, Plan Review #, etc.) and access plan review comments from all departments and agencies.	X			
2. Ability to provide dates that plans were sent, reviewed, due, rejected or approved for multiple reviewers, as well as a remarks area for each reviewer.	X			
3. Ability to redline plans submitted electronically	X			
4. Ability for a plan reviewer in each department to select a specific plan review comment from a list of standard comments.	X			
5. Ability to define and add standard conditions as well as free form condition information.	X			
6. Ability to merge conditions into letters and other documents.	X			
7. Ability to track staff time for projects and associated account numbers	X			
8. Ability to provide automatic Outlook reminders when project is coming due	X			
Inspections				
1. Ability to track inspections by type, inspector, scheduled date and completed date.	X			
2. Ability to automate inspection assignments based on inspector availability, expertise, and familiarity with project	X			
3. Work center provided where inspectors can view all assigned inspections.	X			
4. Ability to quickly re-assign inspections to another Inspector.	X			
5. Ability to allow different checklists for each inspection type.	X			
6. Ability to have standard notes unique to each inspector and each inspection type.	X			
7. Ability to batch schedule inspections from a single screen for all inspection requests.	X			

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8. Ability to automatically insert a re-inspection fee based on the failed status of an inspection.	X			
9. Ability to automatically email the appropriate party of inspection results.	X			
10. Ability to ensure that previous inspections are approved, before accepting the next inspection type.	X			
11. Ability to view a centralized Work Calendar for all inspectors.	X			
12. Ability to reroute inspections from the Work Calendar by dragging and dropping to another Inspector's calendar.			X	Citizenserve does not support drag and drop but provides for an easy way to reassign inspections.
13. Ability to view Microsoft Outlook calendar appointments on the Work Calendar.			X	Inspections and other calendar activities can be added to Outlook or Google calendar via an ICS file included in the e-mail invite or reminder. Two way integration can also be achieved via Exchange Web Services. The cost to add this integration is a one-time fee of $5,000.
14. Ability to allow an Inspector to record audio notes and play them back at any time.	X			
15. Ability to add attachments to a permit from a mobile device.	X			
16. Ability to change the status codes of an inspection to our City's terminology.	X			
17. Ability to associate a unique amount of time with each inspection type, to allow for a daily "cap" of inspections.	X			
18. Ability to integrate with an IVR system (not vendor hosted) for contractors to result inspections via phone.	X			Citizenserve has a built-in IVR functionality. Integration with an external system can be accomplished for a one-time fixed fee of $5,000.
19. Ability to require other department sign-offs prior to final Building Inspection.	X			
Code Enforcement				
1. Ability to allow multiple violations to be added to a single case while tracking each resolution and status individually.	X			
2. Ability to track multiple violations with different statuses per case.	X			
3. Ability to track follow-up dates to ensure the issue is resolved.	X			
4. Ability to view/add restrictions to a parcel when a Case is created.	X			
5. Ability to allow user rights to determine which Users are able to view Case information/details.	X			
6. Ability to attach images to the Case.	X			
7. Ability to create a Case Details Report which itemizes all details pertaining to the case, including photos.	X			
8. Ability to easily create MS Word letters and merge	X			Citizenserve uses a built-in device and

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data from system into letter.				browser independent HTML editor for creating template documents and e-mails. Word documents can be imported into this editor.
9. Ability to view all details of a case from a single screen, without selecting different tabs or windows.	X			Citizenserve uses tabs for different information in the file. The user can select to see everything in a single screen via the case reports.
10. Ability to track all activities on the record, including when phone calls were made, letters printed, etc.	X			
11. Ability to print and attach a letter for historical purposes in a single step.	X			
12. Ability to automatically assign a Case to a default Officer if received from online.	X			
13. Ability to automatically lock a parcel when certain code Cases are created, to prevent permits from being issued.	X			
14. Ability to restrict access to the Complainant information to only Code Officers.	X			Staff users with view access to code cases will be able to see all the parties related to the case. Citizens cannot see the complainant when using the citizen portal.
15. Ability to allow code officers to enter results of their inspections including items for correction in the field either online or offline.	X			Citizenserve requires an internet connection; the offline requirement is not met.
16. Ability to duplicate part or all of the data from one case record to another.	X			
17. Ability to create code violation cases related to permit inspections in the field.	X			
18. Ability to print images associated with the case into a letter.	X			
19. Ability to determine automatic inspection, reviews and fees based on type and sub-types.	X			
20. Ability to track and administer vehicle abatement program.	X			
Reporting				
1. Ability for end-users to customize reports.	X			
2. Ability to use Crystal Reports and SQL reporting services to generate reports.			X	Citizenserve has a built-in reporting wizard for end-users. SQL can also be used to create custom reports. The unlimited support included with the user subscription includes the creation of custom reports.
3. Ability for users to create queries on the fly and save for future use.	X			
4. Ability for users to select favorite reports and group them into folders for future use.	X			
5. Ability to view a report preview prior to printing.	X			
6. Ability to export/convert reports into Adobe PDF, MS Excel, or MS Word format.	X			Reports can be exported to PDF and Excel. Once exported to Excel these

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					can be imported into Word.
7.	Ability for users to create mail merge in MS Word.	X				Merge templates are created using a HTML editor that is device and browser independent. Word documents can be imported into the HTML editor. All reports can be merged with templates to create batch letters or e-mails.

GIS					
1.	GIS-centric (i.e., real-time link to ArcSDE)			X		Google Maps is built into Citizenserve; any GIS layers can be imported and viewed in Citizenserve. Real-time integration can also be provided at a one-time integration setup cost of $5,000.
2.	SQL Server Platform	X				No server software or hardware is required to use Citizenserve. Data exports are provided in SQL Server format and report scripting is in transact SQL.
3.	ESRI ArcGIS 10.3 compatible.	X				Layers can be imported from ESRI, real-time integration is also possible via web services.
4.	Ability to create permits and other records directly from a map service.	X				
5.	Ability to create GIS maps that display queried data.	X				
6.	Ability to email map as a pdf attachment.	X				
7.	Ability to create mail merge notifications from a map service.	X				
8.	Ability to add new permits/records to selected parcel(s) directly from a map service.	X				
9.	Ability to view detailed parcel information from a map service.	X				
10.	Ability to measure distance from one parcel to another or a collection of selected parcels.	X				
11.	Ability to Select parcels within a specified radius or drawn boundary in a map service.	X				
12.	Ability to mark-up GIS maps easily and send modified map in PDF or image format.	X				

Mobility / In-Field Usage					
1.	Ability to access to permit data and related property information through a map service in the field.	X				
2.	Ability to access to aerial photo information in the field.	X				
3.	Ability to access all property information while mobile.	X				
4.	Ability for field inspectors to print system documents in the field.	X				
5.	Ability to configure security to assure that only authorized persons are allowed to sign off on an inspection.	X				

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6. Ability to support remote data entry.	X				
7. Ability to allow users to operate in the field with hand-held devices or laptop computers.	X				
Online/Citizen Access					
1. Ability to provide interactive permit application to the public.	X				
2. Ability to receive notification of status change or project activity via email	X				
3. Ability to update contractor info - If multiple contractors, identify who is responsible for what work and provide notification for what the contractor's license allows them to do.	X				
4. Ability to view inspection results	X				
5. Ability to view a chronological list of items to be completed prior to project completion	X				
7. Ability to access and print approved permits	X				
8. Ability to search for a business license by business name, address, owner name or phone # and not allow confidential info to be seen.	X				
9. Ability for applicant to re-print a business license or renewal notice.	X				
10. Ability to submit simple building permit applications online, check application status, and renew business license.	X				
11. Ability to accept payments online through PayPal or other service provider	X				
12. Ability to post information real-time to the database.	X				
13. Ability to view a map of a selected parcel using GIS Map service showing current and historical data.	X				
14. Ability to file a complaint online.	X				
15. Ability to pay outstanding fees online.	X				
16. Ability to match the web pages to our web page format, not only a header bar with the agency's logo.	X				The citizen portal application is customizable with HTML.
17. Ability to have different security levels that determine information available to certain citizens (i.e., Generic vs. Contractor vs. Applicant login).	X				
18. Ability to upload plans and any attachment type.	X				
19. Ability to customize screens are viewable online.	X				
20. Ability to require certain fields and collect custom information during online entry.	X				
21. Ability to schedule inspections online.	X				
22. Ability to view the status of a permit, project, license or case online.	X				
23. Ability to allow outside inspectors and plan reviewers to input results & comments online.	X				Users participating in plan review or inspections on projects will require a Citizenserve subscription.

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24. Ability for Application System Administrators to change the configuration and preferences of the online system.	X			
25. Ability to view attachments online.	X			
26. Ability to view plan review notes and comments online.	X			
27. Ability to submit a request for service online, be notified of the service request receipt and case initiation, and subsequently find and track the case online.	X			
Business License Management				
1. Ability to require validation of a city address in City's GIS database when submitting a new business license application (or changing address when renewing). If address not found, system should provide info on how to proceed.	X			
2. Ability for comprehensive reporting to support any interface to an external system that provides a complete audit trail and tool for diagnosing any errors that occurred for a given transaction.	X			
3. Ability to provide full license history, including but not limited to change of operators and owners, delinquency history, and formal complaints.	X			
4. Mechanism provided to reduce likelihood of duplicate records for same business and/or detect duplicates that may have occurred.	X			
5. Provision of flexible delinquency tracking and penalty assessment capabilities.	X			
6. Automatic renewals and fee calculations.	X			
7. Support provided for unlimited user-defined license types & auto-generated license numbers.	X			
8. Ability to calculate license fees based on City's fee schedule.	X			
9. Ability to customize or add fields.	X			
10. Ability to transmit business license applications (including changes of address) to Planning Department for zoning approval and Building Department for Use and Occupancy verification.	X			
Citizen Response Management				
1. Ability to route complaint information to the appropriate department.	X			
2. Ability to store contact information for site of complaint and complainant.	X			
3. Ability to link to site address.	X			
4. Ability to provide the description and resolution of the complaint with unlimited text.	X			
5. Ability to generate email with issue details.	X			

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

1.   Project Kickoff: The first portion of the project is the project kick off meeting which will include the key client team and the Citizenserve engagement manager. Key components of the project will be discussed including roles, responsibilities, timeline, objectives. The Citizenserve engagement manager will provide a Setup Checklist of supporting documentation that will be required to begin the setup. The supporting documentation typically includes things like copies of permit applications, fee structures, notices and forms, etc.

2.   Completion of the Setup Checklist: The client team will work to gather all documentation and information included in the setup checklist

3.   Initial setup: The Citizenserve engagement manager will work from the information on the setup checklist to configure the system, typically the initial setup 50% of the entire setup.

4.   System Walkthroughs: Once the initial setup is complete a weekly meeting will be scheduled with the client team and the engagement manager. During the walkthrough meetings the team will review each area of the system and make a list of changes or additions. The walkthroughs are an iterative process that allows the client to clarify or improve upon existing processes and configure Citizenserve to support those processes.

5.   Data Migration: Once the setup is nearly complete the Citizenserve team will begin creating programs to migrate and import the client data. The client will have the opportunity to review the migrated data; changes will be made to the migration script as needed. The data migration import can be modified and run as many times as needed to ensure accuracy of imported data.

6.   Training: One to two weeks before go live, staff members will be trained via web conferencing in small groups. Each training session will focus on that groups core job responsibilities. Most users attend 1 or 2 ninety minute training sessions, additional one-on-one training sessions can be scheduled for users who would benefit from additional training.

7.   Go Live: Final data is typically provided on a Friday afternoon. Over the weekend all test data is removed from the system and the data is imported.   The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial.

8.   Ongoing Support: Users can request support for any needs or questions through the Citizenserve support center. Response time to a support request is within 4 hours, urgent requests receive a response within an hour. Our support staff is available to help you utilize existing and new features as well as modifying your setup for process changes as needed.

Risk Management

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

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

Critical success factors during implementation include:

1) Getting us the information we need at the beginning of the setup.

2) Making sure key stakeholders and key users are attending setup meeting and walkthroughs.

3) There is always some resistance to change and disagreements among staff members. Strong executive sponsorship is necessary to lead the troops to the finish line.

Issue Management

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

Quality Assurance

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

TRAINING

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

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

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

SUPPORT AND MAINTENANCE

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

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

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

COST PROPOSAL

The following quote has been prepared for you based on our understanding of your needs.

Annual Subscription Fees	
User Subscriptions (11 users at $125 per user per month)	$16,500
One-Time Initial Fees	
Training	$2,200
Setup and Configuration	$3,300
Project Management	$1,100
Data Migration*	TBD
Systems Integration**	TBD
Total First Year Fees	$23,100
Each Additional Year Fees	$16,500

*We can provide a fixed price for data migration after looking at the data and discussing the City's requirements.

*Integration points are a one-time fixed price of $5,000. After the integration is developed and tested, support for the integration is included at no additional charge with the subscription.

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ADDITIONAL INFORMATION

Citizenserve Brochure
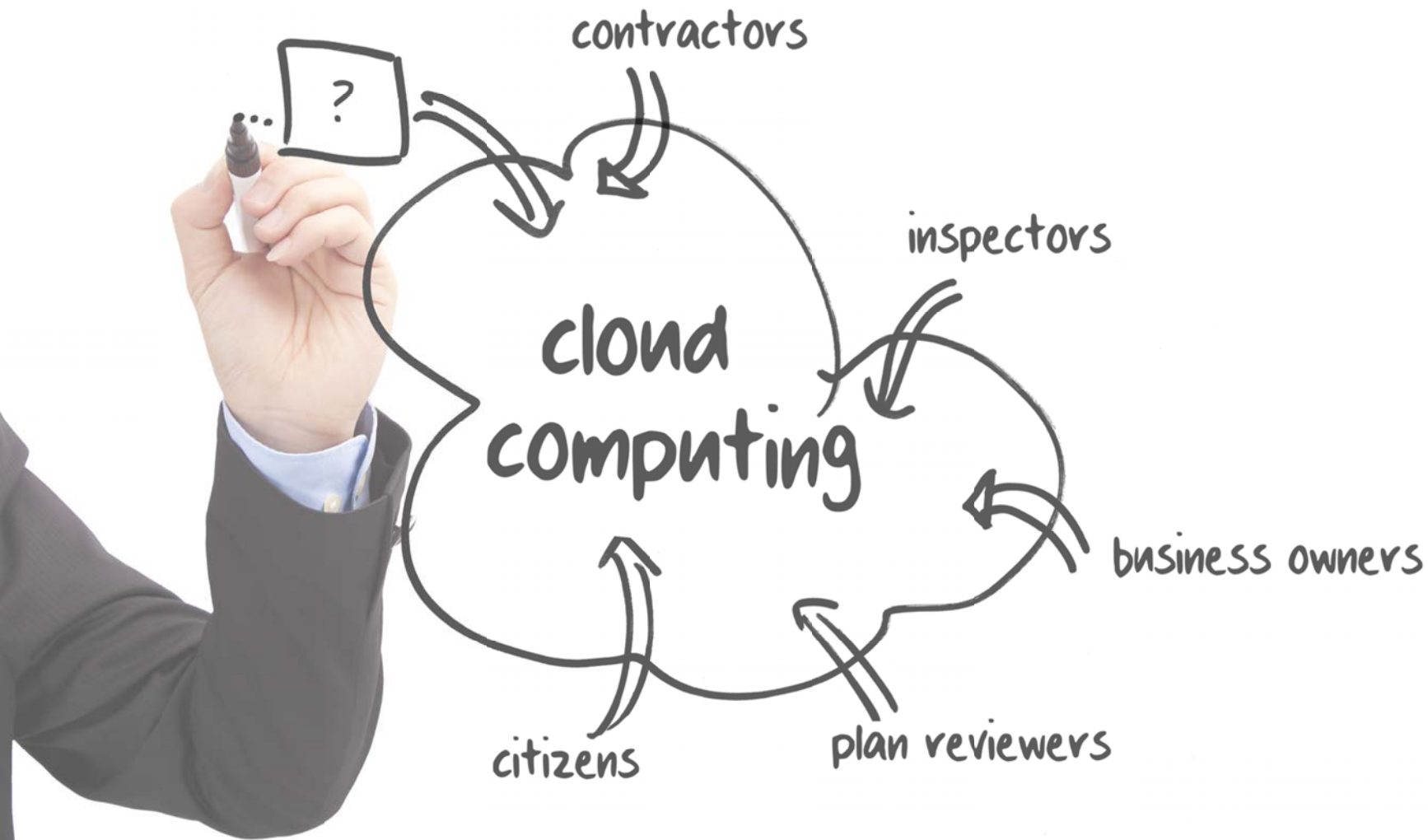
Join the
cloud computing revolution.

Cloud Computing

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

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

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

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

E-Government Statistics

Percentage of municipalities that offer online license application and renewal: **78%**

Percentage of municipalities that offer online permit application: **67%**

Percentage of municipalities that report an increase in customer service as a result of their online service offerings: **86%**

Percentage of municipalities that report saving money as a result of their online service offerings: **68%**

Percentage of municipalities that report lack of IT staff as a barrier to providing online services: **46%**
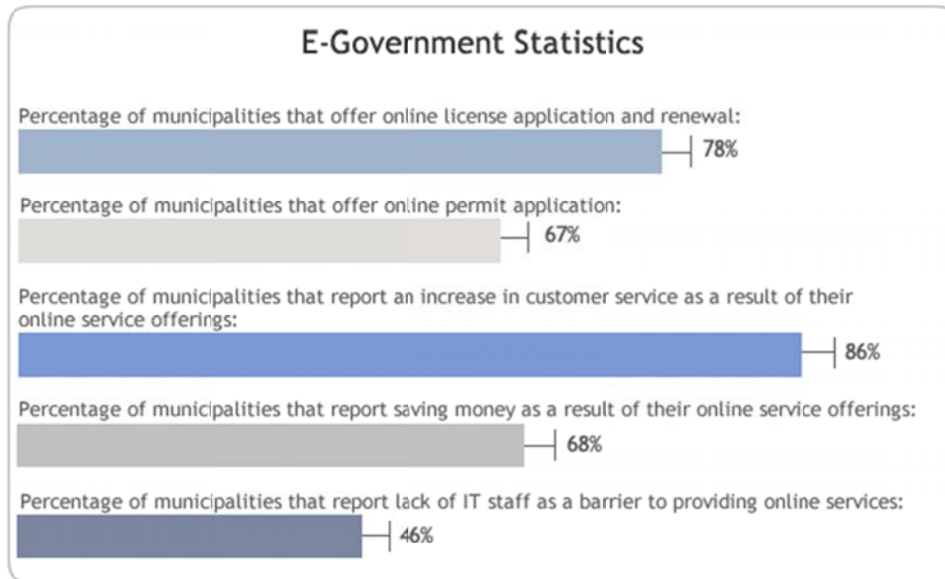
Source: Norris, D., & Reddick, C. (2011). *The Electronic Government Survey*. Washington, DC: International City/County Management Association.

easy to learn & use

fully mobile.

features

mapping

online portal

flexible reporting

easily configurable

General Features

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

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

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

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

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

> ❝ We began using citizenserve in 2010, the internet based feature and customization were the initial selling points for our town; however, the service response and continuing improvements to the software has been the real key to the software. ❞
>
> -Town of Duck

Permitting

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

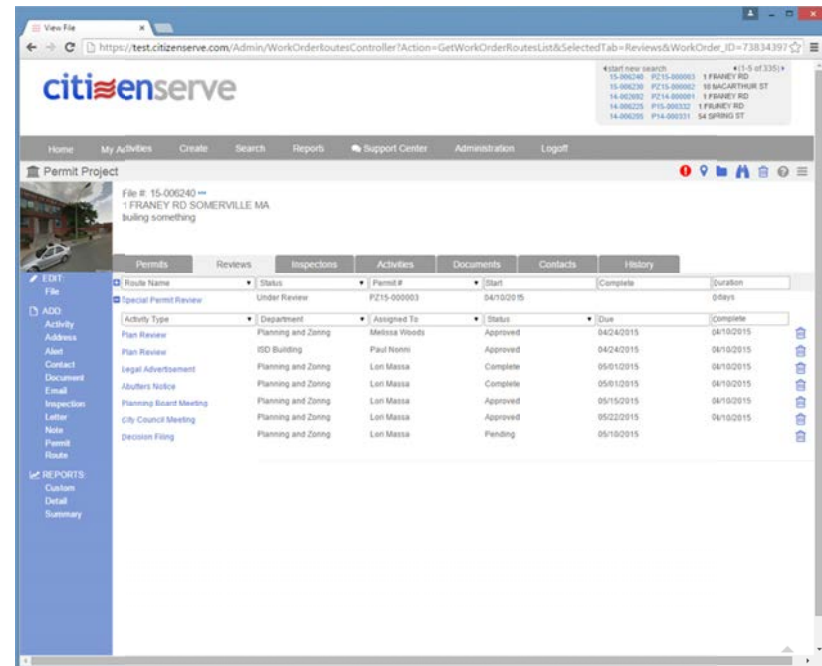Create customized workflow routes that mimic your plan review process and digitally track plan review status and comments. With the document markup tool measure distances, add comments, shapes and highlights to plans and documents.

Move to the citizenserve cloud

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

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

Planning and Zoning

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

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

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

-City of Lewiston

Code Enforcement

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

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

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

-City of Boulder

Business Licensing

Citizenserve business licensing software automates the application, payment, review, and renewal of business licenses.
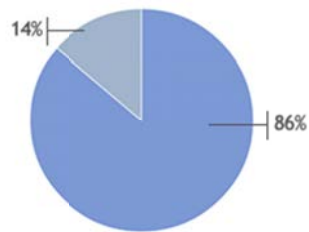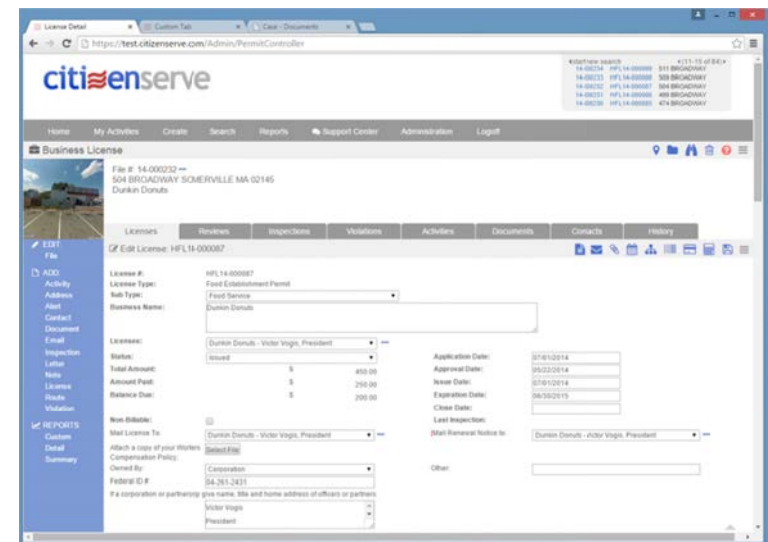
Move to the citizenserve cloud

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

Businesses can submit applications, upload copies of required documents and pay application fees through the citizenserve online portal. Create customizable deficiency checklists based on application types and quickly generate and email of Deficiency Notices. If an inspection is required before issuance, citizenserve can automatically notify your inspectors of pending applications and required inspections. Upon final approval, generate License Certificates and ID cards that can be mailed, emailed or downloaded from the online portal.
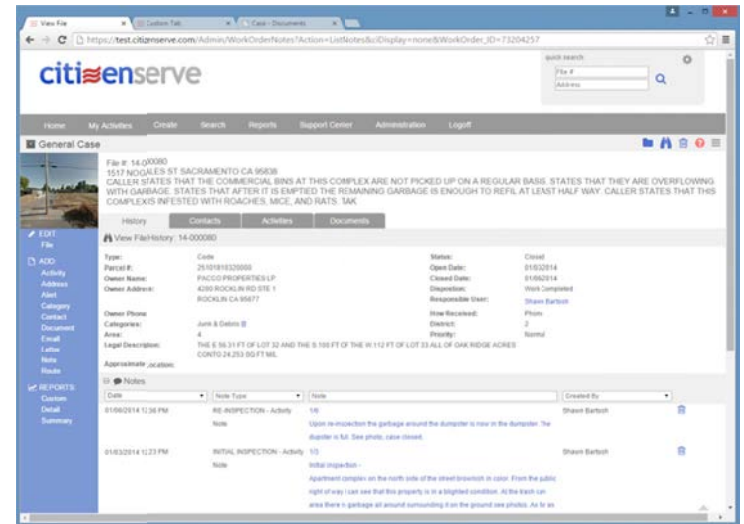
When it comes time for renewal, create batch email or mail renewal notices quickly. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewal.
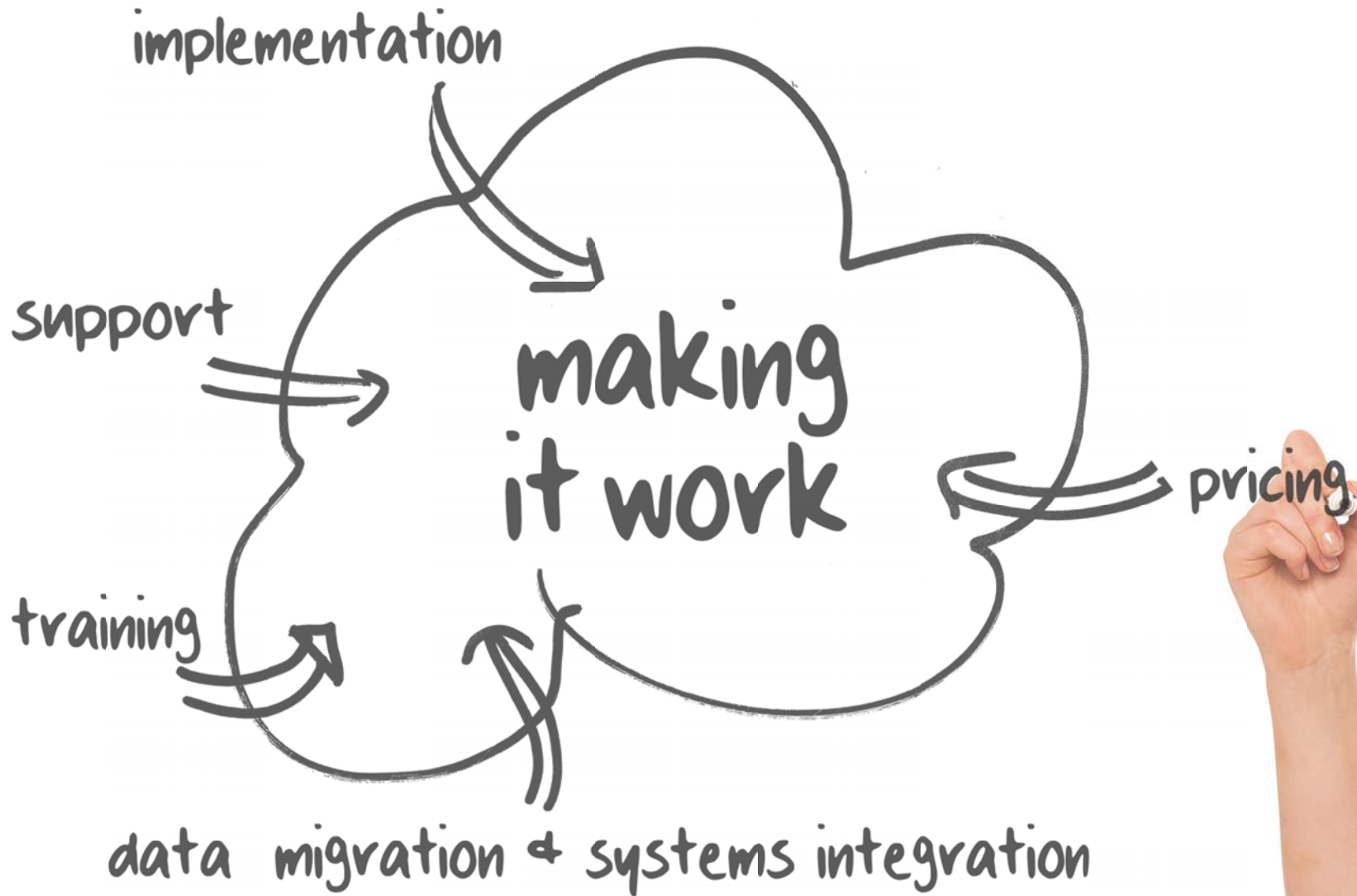
Request Tracking

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

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

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

-City of Sacramento

implementation

support

training

making it work

pricing

data migration & systems integration

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

> ❝ We have been with citizenserve for a few years now and are very impressed with the level of service we receive and the speed of response. We would highly recommend them. ❞
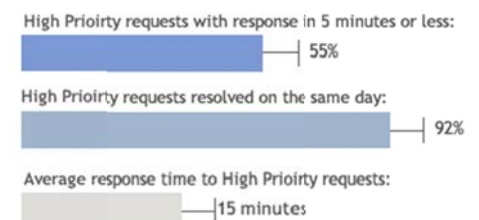>
> -City of Athens

> ❝ My staff and I couldn't be happier. Citizenserve has been fantastic in getting us up to speed and helping us with changes to our new procedures. It's like dealing with good friends. ❞
>
> -City of Oviedo

Concierge Program

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

Concierge Program Statistics

High Prioirty requests with response in 5 minutes or less: 55%

High Prioirty requests resolved on the same day: 92%

Average response time to High Prioirty requests: 15 minutes
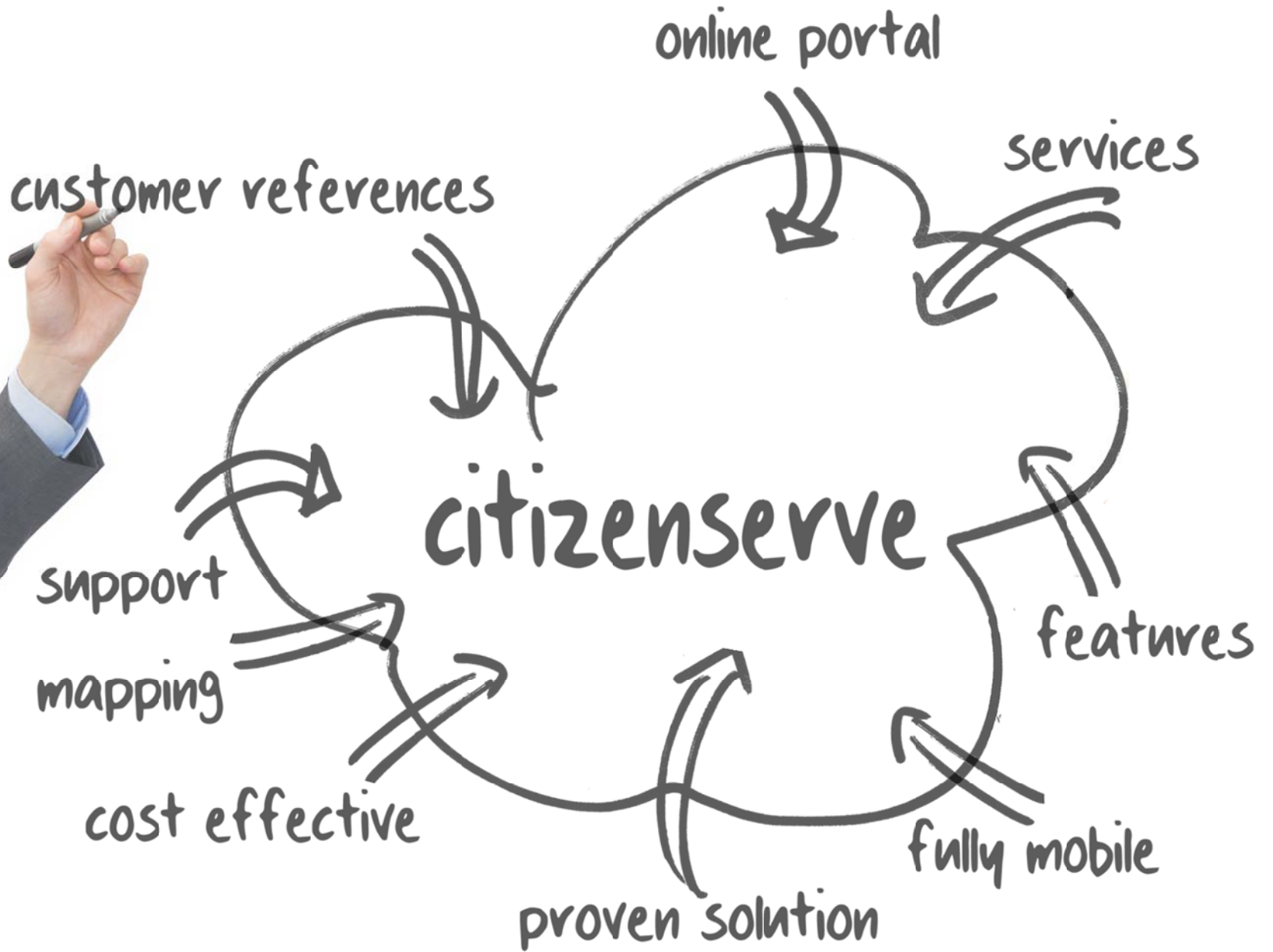
Pricing

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

User Subscription Fees	
Number of Users	Annual Fee per User
1 – 10	$1,800
11 – 25	$1,500
26 – 50	$1,200
50 or more	$900
One-Time Initial Fees	
Service	Fee per User
Training	$200
Setup and Configuration	$300
Project Management	$100
Data Migration*	varies
Systems Integration*	varies

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

Contact Us

1.800.325.9818

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