



**TOWN BOARD MEETING**  
**WEDNESDAY, June 25, 2025**  
**6:00 p.m.**  
**FREEDOM TOWN HALL - W2004 COUNTY RD S**

1. Call to order, roll call, pledge
2. Verification of posting/adopt agenda
3. Consideration of the minutes of the Town Board meeting on 5/28/2025
4. Public comment session (maximum 15 minutes total)
5. Discussion and possible action on Pay App #2 for VFW Diamond 1 Project– Dan Rammer
6. Discussion and possible action on Operator Licenses & Retailer License Renewals
7. Discussion and possible action on Chapter 18 Addressing
8. Discussion and possible action on selecting RFP proposal for online permitting, licensing, and payment software
9. Discussion and possible action on amending Class B Road Ordinance – Vine Road
10. Appoint Park Committee Member
11. Discussion on Open Meetings laws
12. Department Reports –
  - a. Fire Company Report
  - b. First Responder Report
  - c. Highway Department Report
  - d. Attorney Report
  - e. Planner Report
  - f. Administrator Report
  - g. Park Committee Report
  - h. Outagamie County Police Dept Report
13. Identify Future Agenda Items
  - a) VFW Contract
  - b) Right-of-Way Obstruction Ordinance
  - c) Chapter 19: Parks
  - d) Social Media & Communications Policy
  - e) Ordinance Enforcement & Administrative Authority
14. Consideration Of Vouchers/Direct Deposits
15. Adjourn

Posted on the Board at the Freedom Town Hall and on the Town website on the 20<sup>TH</sup> of June 2025 by 4:00 PM by the Clerk's Office.

Dana McHugh, Clerk/ Treasurer

**TOWN BOARD MEETING MINUTES  
WEDNESDAY, MAY 28, 2025 - 6:00 p.m.  
FREEDOM TOWN HALL - W2004 COUNTY RD S**

1. Call to order, roll call, pledge  
**Chairman Schumacher called the meeting to order at 6pm. Members present: Chairman Justin Schumacher, Supervisor Linda Borneman, & Supervisor Kevin Schuh, & Supervisor Fox. Excused: Supervisor Jenn Tomazevic Also present: Administrator Justin Carlson, Deputy Clerk/ Treasurer Rachel Kolocheski, Town Planner Jeff Sanders, Town Attorney Keith Steckbauer, and Financial Advisor Adam Ruechel with Baird. Chairman Schumacher led the Pledge of Allegiance.**
2. Verification of posting/adopt agenda  
**Posted on the Board at the Freedom Town Hall and on the Town website on the 27TH of May 2025 by 6:00 PM by the Clerk's Office. Motion made by Supervisor Borneman with a second by Supervisor Fox.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
3. Consideration of the minutes of the Town Board meeting on 4/15/2025 & 4/23/2025  
**Motion made by Supervisor Borneman to approve the minutes of the Town Board Meeting from 4/15/25 & 4/23/2025, Seconded by Supervisor Fox.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
4. Public comment session (maximum 15 minutes total)
5. Presentation from Baird on Quarter 1 Financial update—Adam Ruechel
6. Presentation and action on bids from MSA for Maloney Road addition and Parking lots – Dan Rammer  
**Motion made by Supervisor Borneman to approve the Northeast Asphalt Base Bid for Maloney Road South of Lau Road to the town line, Seconded by Supervisor Schuh.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
7. Discussion and possible action on Pay App #2 for 2024 project – Crack Seal and Seal Coat project—Dan Rammer  
**Motion made by Supervisor Fox to approve Pay App #2 for the 2024 Crack & Seal Project, Seconded by Supervisor Borneman.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
8. Discussion on current engineering projects (VFW D1 - construction update, Vine Road)—Dan Rammer  
**VFW D1: Moving forward, installing sod deadline is this Friday, but the plan is to get that done but the rain is making this difficult. They are pretty much on schedule**  
  
**Vine Road: Working with the County currently**  
  
**Lions Park: Moving forward with contract design and should have for the Park Committee Meeting June 4, 2025**  
  
**Sunshine Road: Tentative plan set up to fix the ditch that runs through many backyards with several fences, trees, etc in the way of drainage**
9. Discussion and possible action on Freedom Athletic Association Diamond 5 proposal  
**Motion made by Supervisor Fox to accept the donation from Freedom Athletic Association of them installing Diamond 5, Seconded by Supervisor Schuh.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
10. Discussion and possible action on Freedom Athletic Association User Agreement for 2025  
**Motion made by Supervisor Borneman to approve the Freedom Athletic Association User Agreement, Seconded by Supervisor Fox.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
11. Discussion and possible action on Lions Park Paving Donation  
**Motion made by Supervisor Borneman to accept the donation from Lions Club for the Lions Park Paving Project, Seconded by Supervisor Schuh.  
Vote: 4 Yea / 0 Nay Motion Carried: Yes**
12. Discussion and possible action on Preliminary Plat – Chad & Mark Properties  
**Motion made by Supervisor Borneman to recommend the Preliminary Plat as presented to Outagamie County, Seconded**

**by Supervisor Fox.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**

13. Discussion and possible action on Zoning Change – Chad & Mark Properties

**Motion made by Supervisor Borneman to recommend the Zoning Change to Outagamie County, Seconded by Supervisor Fox.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**

14. Discussion and possible action on Special Event Permits; Adam Fox (Freedom Baseball Club), Dan Able, Skunk Hill

**Motion made by Supervisor Borneman to approve the Adam Fox (Freedom Baseball Club) Special Event Permit, Seconded by Supervisor Schuh.**

**Vote: 3 Yea / 0 Nay Supervisor Fox Abstain Motion Carried: Yes**

**Motion made by Supervisor Borneman to approve the Dan Able Special Event Permit, Seconded by Supervisor Schuh.**

**Vote: 4 Yea / 0 Nay Supervisor Motion Carried: Yes**

**Motion made by Supervisor Fox to approve Skunk Hill Special Event Permits, Seconded by Supervisor Schuh.**

**Vote: 3 Yea / 0 Nay Supervisor Borneman Abstain Motion Carried: Yes**

15. Discussion and possible action on Operator Licenses

**Motion made by Supervisor Borneman to approve all Operator Licenses as presented, Seconded by Supervisor Schuh.**

**Vote: 3 Yea / 0 Nay Supervisor Fox Abstain Motion Carried: Yes**

16. Discussion and possible action on Retailer License Renewals

**Motion made by Supervisor Borneman to approve all Retail Licenses as presented, Seconded by Supervisor Fox.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**

17. Discussion and possible action on Chapter 19 Parks

**Motion made by Supervisor Borneman to approve all Retail Licenses as presented, Seconded by Supervisor Fox.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**

18. Discussion and possible action on ordinance enforcement and administrative authority

19. Discussion and possible action on Social Media and Communications Policy

20. Discussion and possible action on Onboarding Training for Elected and Appointed Officials and Staff

21. Department Reports –

- a. Fire Company Report
- b. First Responder Report
- c. Highway Department Report
- d. Attorney Report
- e. Planner Report
- f. Administrator Report
- g. Park Committee Report
- h. Outagamie County Police Dept Report

22. Identify Future Agenda Items

- a) VFW Contract
- b) Right-of-Way Obstruction Ordinance
- c) **Chapter 19 Parks**
- d) **Ordinance Enforcement and Administrative Authority**
- e) **Social Media and Communications Policy**

23. Consideration Of Vouchers/Direct Deposits

**Motion made by Supervisor Schuh to approve vouchers as presented, Seconded by Supervisor Borneman.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**

24. Adjourn

**Motion made by Supervisor Borneman to adjourn at 8pm, Seconded by Supervisor Fox.**

**Vote: 4 Yea / 0 Nay Motion Carried: Yes**



PETERS CONCRETE COMPANY  
1516 ATKINSON DRIVE  
GREEN BAY WI 54303  
920-494-3700

## Unit Billing

Application: 2

Period: 05/16/2025

Owner:

Job Location: FREEDOM VFW PARK 2025(M)

### Application For Payment On Contract

Contract Sum to Date .....	836,507.85
Total Complete to Date .....	347,686.40
Total Retained .....	17,384.33
Total Earned Less Retained .....	330,302.07
Less Previous Billings .....	94,196.06
Current Payment Due .....	236,106.01
Balance on Contract .....	488,821.45

### Contractor's Certification of Work

The undersigned contractor certifies that, to the best of the contractor's knowledge, the work on the above named job has been completed in accordance with the plans and specifications to the level of completion indicated on the attached schedule of completion.

Contractor: Gray Behnke Date: 6/3/2025  
Payment of: \$236,106.01  
Recommended by: Alex Livieri Date: 6/9/2025  
Engineer  
Payment of: \_\_\_\_\_  
Approved by: \_\_\_\_\_ Date: \_\_\_\_\_  
Owner

Terms: Invoices are due and payable from the date of invoice. All overdue amounts will be charged a service charge of 0.00 % per anum. Please make checks payable to: PETERS CONCRETE COMPANY

Thank you for your prompt payment.



## Unit Billing

Application: 2

Period: 05/16/2025

## Schedule of Work Completed

Item	Description	Price/Unit	Contract Plus Changes	Previous Units Billed	Current Units Complete	Total Units Complete	Previous Value	Current Value	Total Value	Retained
1	Mobilization, Bonds	40,000.00	40,000.00	0.50		0.50	20,000.00		20,000.00	1,000.00
2	Traffic Control	10,000.00	10,000.00	0.50		0.50	5,000.00		5,000.00	250.00
3	Temporary Fencing	1,800.00	1,800.00	1.00		1.00	1,800.00		1,800.00	90.00
4	Erosion Control	2,600.00	2,600.00	1.00		1.00	2,600.00		2,600.00	130.00
5	Sawcut	3.00	336.00							
6	Remove Curb and	3.00	90.00	30.00		30.00	90.00		90.00	4.50
7	Remove Pavement	6.00	1,350.00	225.00		225.00	1,350.00		1,350.00	67.50
8	Remove Fencing a	4,500.00	4,500.00	1.00		1.00	4,500.00		4,500.00	225.00
9	Remove Pipe	15.00	180.00	15.00		15.00	225.00		225.00	11.25
10	Salvage Foul Pole	250.00	500.00	2.00		2.00	500.00		500.00	25.00
11	Abandon Pipe	7.00	441.00	63.00		63.00	441.00		441.00	22.05
12	Tree Removal	835.00	10,020.00	11.00		11.00	9,185.00		9,185.00	459.25
13	Topsoil Placement	4.00	24,700.00		4,940.00	4,940.00		19,760.00	19,760.00	988.00
14	Seeding, Generic	2.40	7,860.00							
15	Sod, Outfield	6.60	17,886.00							
16	Outfield Maintenan	4,000.00	4,000.00							
17	Erosion Mat, Urban	1.00	3,275.00							
18	Unclassified Excav	25,421.00	25,421.00		0.15	0.90	19,065.75	3,813.15	22,878.90	1,143.95
19	Concrete Pavemen	7.50	42,937.50	0.75						
20	Asphalt Pavement,	56.25								
21	Concrete Curb & G	70.00	2,100.00							
22	Detectable Warning	37.50	600.00							
23	Rebuild Water Spig	750.00	750.00							
24	Nyloplast Drain Bas	2,400.00	14,400.00	6.00		6.00	14,400.00		14,400.00	720.00
25	Storm Sewer, HDP	38.50	16,632.00	432.00		432.00	16,632.00		16,632.00	831.60
26	Storm Sewer, PVC,	95.00	1,140.00	12.00		12.00	1,140.00		1,140.00	57.00
27	Storm Sewer, PVC,	33.30	965.70							
28	Pipe Underdrain, P	25.85	12,123.65							
29	Inserta Tee, 8-Inch	1,175.00	1,175.00	1.00		1.00	1,175.00		1,175.00	58.75

## Unit Billing

Application: 2

Period: 05/16/2025

## Schedule of Work Completed

Item	Description	Price/Unit	Contract Plus Changes	Previous Units Billed	Current Units Complete	Total Units Complete	Previous Value	Current Value	Total Value	Retained
30	Storm Sewer Core	1,050.00	1,050.00	1.00		1.00	1,050.00		1,050.00	52.50
31	Bleachers	28,000.00	28,000.00							
32	Flag Pole with Base	1,700.00	1,700.00							
33	Dugout Roof Struct	24,000.00								
34	Salvage & Relocate	7,500.00	7,500.00		1.00	1.00		7,500.00	7,500.00	375.00
35	Install Foul Pole	4,202.00	8,404.00							
36	Backstop Wall, Cast	51.10	43,690.50							
37	Backstop Netting	35,986.00	35,986.00							
38	Home Plates, Base	10,000.00	10,000.00							
39	Infield Skin Surface	23.10	34,650.00							
40	Warning Track	18.50	12,117.50							
41	Chain Link Fences	46.10	44,256.00							
42	Landscaping	11,365.00	11,365.00							
43	Electrical	249,086.00	249,086.00		0.75	0.75		186,814.50	186,814.50	9,340.73
44	Segmental Block R	87.75	15,795.00		180.00	180.00		15,795.00	15,795.00	789.75
ALTERNATE										
A15	Seeding, Outfield	3.91								
A20	Conc. Pavement, 5-	7.50	37,125.00		1,980.00	1,980.00		14,850.00	14,850.00	742.50
A33	Dugout, Block Wall	24,000.00	48,000.00							
Totals:			836,507.85	802.75	7,101.90	7,904.65	99,153.75	248,532.65	347,686.40	17,384.33

Operators for Approval- OK'd by VanBeek

Jennifer Fassbender

Christine Nabbefeld

Katie Linsmeyer

Anna Lewandowski

Mary Scray

Summer Howard

Brooke Krause

Rebecca Weinke

Joann Green

Retail for Approval-

Sal's

**Issue Report:** Chapter 18 (Addressing)

**From:** Administrator Carlson

**To:** Town Board of Supervisors

**Date:** June 25, 2025

## **BACKGROUND**

Chapter 18 of our code of ordinances needs to be amended to remove section *18-073: Addressing*. This is due to the fact that County Zoning takes precedence over this matter and the language runs counter to the county's process for issuing addresses.

## **RECOMMENDATION**

Make a motion to strike section 18-073 from Chapter 18 of the municipal code of ordinances.

- (1) 10 copies of the completed Application for Preliminary Plat.
    - (a) Two copies of the plat 22 inches by 30 inches.
    - (b) Eight copies of the plat 11 inches by 17 inches.
  - (2) Four copies of all other plans and specifications required in this Chapter.
  - (3) One copy of the Application for Preliminary Plat, the plat, and all other supporting information and documentation in PDF format, or an equivalent format acceptable to the Town.
- B. Within 90 days of the date of filing the plat, the Town, or its approving authority, shall take action to approve, approve conditionally, or reject the preliminary plat, unless the time is extended by agreement with the subdivider, based on its determination of conformance with the provisions of this Chapter and the comprehensive plan. One copy of the plat shall thereupon be returned to the subdivider with the date and action endorsed thereon; and, if approved conditionally or rejected, a letter setting forth the conditions of approval or the reasons for rejection shall accompany the plat and shall be submitted to the subdivider.
- C. Failure of the Town, or its approving authority, or its agent, to act within 90 days of the date of filing, or agreed extension thereof, constitutes an approval of the preliminary plat.
- D. Approval or conditional approval of a preliminary plat shall not constitute automatic approval of the final plat, except that if the final plat is submitted within 36 months of the preliminary plat approval and conforms substantially to the preliminary plat as approved, including any conditions of that approval, and to any local plans and ordinances adopted as authorized by law, as indicated in Wis. Stat. § 236.11(1)(b), the final plat is entitled to approval.

#### 18-073 Addressing.

In order to ensure timely emergency response, addresses shall be assigned as part of the final subdivision plat. Land divisions that create new streets shall also have addresses assigned whenever possible. Minor land divisions that create new streets shall also have an address range determined. The subdivider shall contact the agency responsible for assigning addresses in the Town to determine the address for each proposed lot.

#### 18-074 Development Agreement.

As a condition of approval of a final plat, the subdivider shall enter into a development agreement per this Chapter. This agreement shall provide for time limits and security for performance and penalties for noncompliance. The agreement will not create or invoke special treatment for the developer, nor imply or create promises of approval.

#### 18-075 Through 18-079 Reserved

**Issue Report: Selecting Proposal for Online Permitting, Licensing, and Payments****From:** Administrator Carlson**To:** Town Board of Supervisors**Date:** June 25, 2025**BACKGROUND**

The Town issued an RFP primarily for seeking an online permitting, licensing, and payment solution to streamline the application process, enhance accessibility to services for residents, improve the accuracy of permits and efficiency of the process, and create new, informative reports that better utilize data received from our permitting and licensing process.

We were fortunate to receive proposals from six different companies, all of which would satisfy the core requirements of our RFP. Dana and I attended virtual demonstrations for all of the vendors during this process, with the exception of HeyGov, with whom we had met and gone through a demonstration last year.

The following assessment reflects the considerations of staff for assessing the costs, features, user-friendliness, and reference recommendations. I reached out to at least three references for each vendor to seek feedback from municipalities currently deploying their products and received a fair number of responses.

**ANALYSIS****FEATURES**

The following chart indicates available features provided by each vendor:

Feature	HeyGov	Cloudpermit	Polimorphic	Citizenserve	SmartGov	Civos
Permitting	✓	✓	✓	✓	✓	✓
Licensing	✓	✓	✓	✓	✓	✓
Payments/Online Payments	✓	✓	✓	✓	✓	✓
Facility Reservations	✓	X	X	X	X	X
Citizen Reporting/Resident Requests	✓	X	✓	✓	✓	X
Code Enforcement	X	✓	X	✓	✓	X
Planning/Zoning/Land Use	X	✓	X	✓	✓	X
Document/Plan Management	X	✓	✓	✓	✓	✓
Customizable Forms	✓	✓	✓	✓	✓	✓
Workflow Automation	X	✓	✓	✓	✓	✓
Mobile Access/Inspections	✓	✓	X	✓	✓	✓
Online Applications/Portal	✓	✓	✓	✓	✓	✓
Reporting & Analytics/Custom Reports	X	✓	✓	✓	✓	✓
GIS Integration/Mapping	X	✓	X	✓	✓	✓
Unlimited User Licenses	X	✓	X	X	X	✓
AI Features (Chatbot/Meeting Minutes/Voice)	(✓)*	X	(✓)*	X	X	X
REST API/Third-Party Integration	✓	✓	✓	✓	✓	✓
Electronic Plan Review	X	✓	X	✓	✓	✓
E-signature Support	✓	✓	✓	✓	✓	✓
Conditional Logic in Forms	✓	✓	✓	✓	✓	✓
Document Uploading	✓	✓	✓	✓	✓	✓
TOTAL FEATURES	13/21	18/21	14/21	18/21	18/21	16/21

Those shaded in green are the core requirements we asked for in the RFP. Those shaded in blue represent additional features either we indicated we would be interested in, or the vendor can provide. Three vendors provide 18 out of 21 unique services provided across all of the proposals (Cloudpermit, Citizenserve, and SmartGov/Granicus). Civos provides 16 out of 21 unique services, while Polimorphic and HeyGov provide 14 and 13 out of 21, respectively.

## **PRICING**

The following chart indicates one-time set-up costs, annual costs, and 5-year cost for each vendor:

Vendor	Year 1	Year 2	Year 3	Year 4	Year 5	Total 5 Year Cost (Includes one-time set-up costs)
HeyGov	\$8,200	\$7,000	\$7,000	\$7,000	\$7,000	\$36,200
Cloudpermit	\$14,450	\$9,724	\$10,113	\$10,416	\$10,833	\$55,536
Polimorphic	\$12,000	\$12,000	\$12,000	\$12,000	\$12,000	\$60,000
Citizenserve	\$33,500	\$13,500	\$13,500	\$13,500	\$13,500	\$87,500
Civos	\$38,000	\$18,000	\$18,000	\$18,000	\$18,000	\$110,000
SmartGov	\$45,303.61	\$22,174.58	\$23,283.31	\$24,447.47	\$25,669.85	\$140,878.82
Notes:						
1. HeyGov proposal does not include every feature they offer. Total annual would increase if purchasing every feature, bring 5-year cost to approx. \$51,200						
2. Cloudpermit and SmartGov increase annually while the other vendors charge a flat rate.						
3. Year 1 costs include one-time set-up costs for Cloudpermit, Citizenserve, Civos, and SmartGov.						

HeyGov is clearly the cheapest option, but the proposed figure does not include an additional \$3,000 annually for their automated AI-driven meeting minutes platform. Including that feature would bring their 5-year cost to \$51,200. Cloudpermit and Polimorphic round out the top three in costs. Citizenserve, Civos, and SmartGov are all in a higher tier of both short and long-term costs, partially due to higher one-time set-up costs. Annual costs vary across the platforms, with most being charged at a flat rate. Cloudpermit's costs increase annually at an average rate of 3.75% while SmartGov increases 5% annually.

## **SELECTION**

After considering costs, features, demonstrations, references, short-term and long-term needs, staff believes Cloudpermit is the best option for the Town of Freedom. Cloudpermit offers the most comprehensive services for the most competitive pricing. It covers all of our core features that we are looking for at this time, along with others that will be beneficial as well.

Additionally, the features that it does not offer are available from other platforms we could pursue to augment our move to online platforms. For example, partnering with Cloudpermit for our licensing and permitting needs, then HeyGov for AI-driven meeting minutes and facility reservations would bring our annual cost to roughly \$16,000—less than the annual costs for some of the vendors while we would then have every feature listed in the chart above. There are also other options beyond HeyGov for AI-generated minutes and facility reservations, but this shows the possible cost-effective strategies we could pursue if we were to go with Cloudpermit as our primary permitting and licensing vendor.

## **RECOMMENDATION**

Staff recommends making a motion to approve Cloudpermit's proposal for online permitting, licensing, and payment software.



Cloudpermit Software

# RFP: Community Development Software

RFP Response For:



Attention:

Town Administrator

Justin Carlson

[administrator@tn.freedom.wi.gov](mailto:administrator@tn.freedom.wi.gov)



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## Letter of Transmittal

Freedom, WI  
Attn: Justin Carlson, Town Administrator

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Dear Justin,

Thank you for the opportunity to submit the enclosed proposal for a new community development solution. The enclosed proposal will outline why Cloudpermit's organization, software, and team are uniquely positioned to meet and exceed the requirements for a comprehensive software solution.

We've prepared our comprehensive response and look forward to the opportunity to discuss our offer further with you and your team. If you have any questions about our proposal, please feel free to reach out to me directly.

Today, Cloudpermit serves over 850 local governments and 45 million citizens. We are excited for the opportunity to build a lasting partnership with Freedom. We hope you enjoy reviewing our proposal and learning more about our organization. Together, we can achieve great things for your municipality.

Sincerely,

**Brian Liszka | Director, Sales**

Cloudpermit Software

999 Oakmont Plaza Drive, Sixth Floor, Suite 660

Westmont, IL 60559

brian.liszka@cloudpermit.com | 216.246.1551

## Vendor Profile

### Software Overview

Cloudpermit has been a leading provider of comprehensive community development software for local governments of all sizes since 2011. It is now used by more than 850 municipal governments that serve populations of 5,000 to 100,000 or more.

The company, headquartered in Fairfax County, Virginia, has a full-time staff of more than 100 employees, with regional offices in Chicago, Illinois; Portland, Oregon; Tampa, Florida; and Toronto, Ontario. Cloudpermit's software can help manage every aspect of community development, with modules available for building permitting, planning and zoning, licensing and registrations, code enforcement, contractor registration, land use management, inspections, and public works.

It focuses on serving small and mid-sized governments that have identical functional requirements as their larger counterparts but get by with tighter budgets, fewer IT resources, and limited staff time. Cloudpermit's platform is intentionally designed for quick implementation and easy configuration, providing ongoing value that can evolve with local needs.

#### **Key Product Facts:**

- Cloudpermit has developed comprehensive community development software since 2011.
- Cloudpermit is a proprietary software platform developed in-house, not via acquisition.
- The software is updated monthly, with 24 updates completed over the past two years.
- Cloudpermit is a web-based, cloud-hosted platform compatible with any browser or connected mobile device.
- It's now the fastest-growing community development software platform in the nation, onboarding 20 to 25 new clients each month.
- Cloudpermit is one of the only options on the market that solely focuses on community development software, with 100% of resources dedicated to building, supporting, and improving the best solutions for community development.

## Project Team

Cloudpermit is privileged to have the most experienced professional services team in the community development software industry. Our average team member has more than 10 years of experience deploying community development software and has worked on more than 100 implementations with local governments across the country.

For this project, Cloudpermit will be using the following resources:

### **Tove Wainwright | Director of Professional Services**

Tove leads a team dedicated to delivering successful SaaS implementations for municipalities across North America. With 3.5 years of hands-on experience implementing Cloudpermit solutions—from hand-off to go-live—and two years overseeing Support operations, she brings a deep understanding of both the product and the needs of our customers.

Tove has a strong track record of driving customer success, improving operational workflows, and building high-performing teams. She is passionate about empowering local governments through technology that aligns with their unique processes and goals.

### **Adam Olszewski | Implementation Specialist**

Adam is a seasoned Implementation Specialist with nearly 20 years of experience leading the successful deployment of customized solutions across the SaaS, logistics, and local municipality sectors. He specializes in managing end-to-end implementation processes, from requirements gathering and cross-functional coordination to training, adoption, and post-launch support.

With a proven track record of optimizing workflows, reducing deployment timeframes, and enhancing client satisfaction, Adam is adept at translating a complex municipality's needs into scalable, actionable plans. His expertise in SaaS-based systems, internal process improvements, and stakeholder communications ensures seamless integration and lasting impact for both clients and organizations.

## Experience & References

### Experience

Cloudpermit is focused on one thing: Community development software. Since 2011, our sole focus has been on developing, implementing, improving, and refining our community development software, with 100% of our research, development, and engineering resources dedicated to improving the core modules that make up our platform. This singular focus allows us to:

- Lead the industry in implementation times for municipality community development software.
- Deliver the most out-of-the-box features of any software on the market.
- Deploy the most newest features of any company on an annual basis.
- Be the fastest-growing community development solution and onboard more than 20 new local governments per month.

Cloudpermit also specializes in deploying community development software for county governments. Counties often have unique requirements, including shared services with lower-tier municipalities, unique planning board structures, nuanced GIS requirements, and the realities of covering larger land areas with field staff.



## References



### **Oakbrook Terrace, IL**

Melissa Headley, Community Development  
Director

[mheadley@oakbrookterrace.net](mailto:mheadley@oakbrookterrace.net)

630-941-8300

Services: Building Permitting, Code Enforcement



### **Reedsburg, WI**

Brian Duvalle, Chief Building Inspector

[bduvalle@ci.reedsburg.wi.us](mailto:bduvalle@ci.reedsburg.wi.us)

(608)415-0855

Services: Building, Planning, Code Enforcement



### **Town of North Elba, NY**

Britt Waite, Building Deputy Clerk

[bwaite@northelba.org](mailto:bwaite@northelba.org)

518-523-9518

Services: Building, Planning, Code Enforcement,  
Licensing

# Software Description

## Overview

Cloudpermit is proposing 4 modules which meet the requirements of this RFP:

Module	Key Staff Features	Key Public-Facing Features
Building	<ul style="list-style-type: none"><li>• Manage an unlimited number of building permit types</li><li>• Full review and approval functionality</li><li>• Creation of key documents such as permits, occupancy certificates, and financial information</li><li>• Ability to conduct building inspections from a mobile device in the field</li><li>• Reporting</li><li>• Contractor registration</li></ul>	<ul style="list-style-type: none"><li>• Online application and submission</li><li>• Online inspection booking</li><li>• Ability to track and manage multiple permits from a single dashboard</li><li>• Ability to pay for applications online at various workflow stages</li><li>• Ability to track the status of applications</li><li>• Ability to view results of inspections</li><li>• Register and renew contractor registration</li></ul>
Code Enforcement	<ul style="list-style-type: none"><li>• Ability to track complaints and cases</li><li>• Ability to generate key documents and letters (warnings, notice of violation, etc.)</li><li>• Ability to do inspections from a mobile device in the field, even without internet access</li><li>• Ability to track fines/fees</li><li>• Ability to place orders on properties</li><li>• Ability to easily generate export packages for Freedom of Information requests, court cases, etc.</li></ul>	<ul style="list-style-type: none"><li>• Ability to submit complaints online via a GIS-driven submission portal</li><li>• Ability to submit complaints without needing to create an account or login</li><li>• Ability to submit complaints from a mobile device</li><li>• Ability to submit complaints anonymously, if allowed by the municipality</li></ul>
Licensing & Registration	<ul style="list-style-type: none"><li>• Manage an unlimited number of licensing and/or registration types, including short-term rentals and animal licensing</li><li>• Full review and approval functionality</li><li>• Ability to conduct inspections from a mobile device in the field where necessary</li></ul>	<ul style="list-style-type: none"><li>• Online application and submission</li><li>• Ability to easily renew applications/licenses online</li><li>• Ability to track and manage multiple applications online</li></ul>

	<ul style="list-style-type: none"> <li>• Ability to schedule recurring annual/semi-annual inspections as necessary</li> <li>• Automated renewal notifications to applicants</li> <li>• Reporting</li> </ul>	
Land Use Management	<ul style="list-style-type: none"> <li>• Accept and issue zoning, conditional use, and special use permits online</li> <li>• Easily collaborate with other departments</li> <li>• Require complete applications every time</li> <li>• Create automatic links between related land use and building permits to track projects</li> <li>• Assign conditions to permits</li> <li>• Send circulation requests to receive responses in real-time</li> <li>• Track public opinion and create lists of who needs to be contacted</li> <li>• Accept online payments</li> </ul>	<ul style="list-style-type: none"> <li>• Receive decisions on permits via a link or QR code</li> <li>• Provide public opinion regarding land use considerations</li> <li>• Get automatic updates when permit statuses change</li> </ul>



## Implementation Services/Scope of Work

### Overview of Proposed Project Plan

This is a general overview of the implementation's strategy, milestones, and process.

Cloudpermit estimates 4 months to implement the modules.

Each milestone is reached by applying a tested implementation strategy that has been proven and refined across more than 850 implementations. At a high level, the approach to deploying each module and completing each module is as follows:

Step	Key Tasks
Kick-Off	<ul style="list-style-type: none"><li>• Stakeholder meeting</li><li>• Agree on key dates and times for workshops, data import, training, and go-live</li></ul>
Workshop	<ul style="list-style-type: none"><li>• Assess scope of module's requirements</li><li>• Review forms, fees, workflows, reports, documents, etc.</li></ul>
Data Import	<ul style="list-style-type: none"><li>• Export data from legacy systems</li><li>• Test sample data</li><li>• Import data into staging environment</li></ul>
Configuration	<ul style="list-style-type: none"><li>• Establish client's testing/training environment</li><li>• Version 1 of configurations, based on workshop phase, completed by Cloudpermit implementation specialists</li></ul>
Training & Testing	<ul style="list-style-type: none"><li>• Training of staff (end users and administrators)</li><li>• Client staff testing of version 1 configurations</li><li>• Refinement of configurations until satisfactory to client stakeholders</li></ul>
Go-Live	<ul style="list-style-type: none"><li>• Launch of production environment for staff and public</li><li>• Go-live support</li></ul>

The proposed project plan is Cloudpermit's recommended approach to meet the functional requirements and timelines. Freedom is welcome and encouraged to provide feedback on the project plan. It is critical to ensure that the project plan is well understood and to make staff available for training and testing as agreed upon in the project plan.

Cloudpermit's staff is responsible for overall project management, booking meetings and trainings, and project rigor. Throughout the project, a weekly status call will be held

between Cloudpermit's project team and the client's key stakeholders and/or project manager.

## Training

Timing for training within the overall project is detailed in the project plan. Training is available to an unlimited number of municipal users at no additional cost. Training sessions typically last three hours. All training sessions are recorded and provided to the client for future reference.

Status	MODULE	Town of Freedom Contact	Cloudpermit Sales Lead	Cloudpermit Professional Services	PROJECT START DATE	PROJECT END DATE
●	Building	TBD	Brian Liszka	CP-IS	7/15/25	8/13/25
●	Code Enforcement	TBD	Brian Liszka	CP-IS	8/12/25	9/1/25
●	Business Licensing	TBD	Brian Liszka	CP-IS	9/3/25	10/3/25
●	Land Use	TBD	Brian Liszka	CP-IS	10/22/25	11/20/25
% Complete	TASK NAME			Responsible Party	TASK START DATE	TASK END DATE
0%	Sales Handoff to Professional Services				7/1/25	7/16/25
0%	Internal Sales to PS handoff for Town of Freedom			Brian Liszka, Tove Wainwright	7/1/25	7/1/25
0%	PS Intro email to Town of Freedom			Tove Wainwright	7/1/25	7/1/25
0%	Town of Freedom Handoff meeting with Cloudpermit Professional Services			Tove Wainwright, CP-IS, Town of Freedom project lead	7/2/25	7/2/25
0%	Project Kick Off				7/2/25	7/16/25
0%	GIS information provided to Cloudpermit			TBD	7/2/25	7/9/25
0%	Town of Freedom provides requirements to Cloudpermit for Building			Town of Freedom Building	7/3/25	7/3/25
0%	Configuration of GIS			CP-IS	7/10/25	7/10/25
0%	Draft Project Plan sent to client for approval			CP-IS	7/11/25	7/11/25
0%	Project Plan Approved and Kickoff meeting scheduled			Town of Freedom, CP-IS	7/14/25	7/14/25
0%	Project Kick Off Meeting			Town of Freedom, CP-IS	7/15/25	7/15/25
0%	MILESTONE (PROJECT KICKOFF) complete			CP-IS	7/16/25	7/16/25
0%	Building Discovery Workshop				7/18/25	7/18/25
0%	CP-IS reviews information received by Town of Freedom Building			CP-IS	7/18/25	7/18/25
0%	Discovery Workshop meeting for Building			Town of Freedom, CP-IS	7/18/25	7/18/25
0%	Configuration - Building				7/21/25	7/23/25
0%	Configure Training Environment for Building - Municipality setup			CP-IS	7/21/25	7/21/25
0%	Configure Building Templates			CP-IS	7/21/25	7/21/25
0%	Configure Building Fees			CP-IS	7/21/25	7/22/25
0%	Configure Building Reviews & Inspections (if required)			CP-IS	7/22/25	7/22/25
0%	Configure Building Forms			CP-IS	7/22/25	7/23/25
0%	Training & Testing - Building				7/24/25	8/8/25
0%	Training 1 - Building - Intake, Reviews, Fees, Issuance, Inspections and Admin config			CP-IS, Town of Freedom	7/24/25	7/24/25
0%	Town of Freedom Building testing and configuration updates (as needed)			Town of Freedom Building	7/24/25	7/31/25
0%	Training Session 2 - Admin, fees and reports			CP-IS, Town of Freedom Building	7/31/25	7/31/25
0%	Town of Freedom Building Final Round of Testing			Town of Freedom Building	8/1/25	8/8/25
0%	Go Live - Building				8/13/25	8/20/25
0%	Go/No Go Decision			CP-IS, Town of Freedom Building	8/11/25	8/11/25
0%	Acceptance Email to Brian Liszka for Building confirming production readiness			CP-IS, Town of Freedom Building	8/11/25	8/11/25
0%	Production Deployment Checklist drafted and Production Environment setup			CP-IS	8/12/25	8/12/25
0%	Building Production Launch			CP-IS, Town of Freedom Building	8/13/25	8/13/25
0%	Building Post Go Live, transition to support meeting			CP-IS, Town of Freedom Building Cloudpermit	8/20/25	8/20/25
0%	Kick Off - Code Enforcement				8/12/25	8/14/25
0%	Town of Freedom provides requirements for Code Enforcement			CP-IS, TBD	8/12/25	8/12/25
0%	Code Enforcement Kick Off Meeting			CP-IS, Town of Freedom Code Enforcement	8/13/25	8/13/25
0%	Code Enforcement Kick Off Meeting Follow Up			CP-IS	8/14/25	8/14/25
0%	Code Enforcement Workshop (if required)				8/14/25	8/14/25
0%	CP-IS reviews information provided by Town of Freedom Code Enforcement			CP-IS	8/14/25	8/14/25
0%	Code Enforcement Discovery/Workshop			Town of Freedom Code Enforcement, CP-IS	8/15/25	8/15/25
0%	Configuration - Code Enforcement				8/15/25	8/19/25
0%	Configure Training Environment for Code Enforcement			CP-IS	8/15/25	8/15/25
0%	Configure Code Enforcement Templates			CP-IS	8/15/25	8/15/25
0%	Configure Code Enforcement Fees (if applicable)			CP-IS	8/18/25	8/18/25
0%	Configure Code Enforcement Letters & Forms			CP-IS	8/18/25	8/19/25
0%	Training & Testing - Code Enforcement				8/20/25	8/27/25
0%	Training 1 - Code Enforcement Complaint Intake, Inspections, Letters,			CP-IS, Town of Freedom Code Enforcement	8/20/25	8/20/25
0%	Town of Freedom Code Enforcement configuration setup and testing			Town of Freedom Code Enforcement	8/20/25	8/27/25
0%	Go Live - Code Enforcement				8/28/25	9/1/25
0%	Go/No Go Decision			TBD, Town of Freedom Code Enforcement, CP-IS	8/28/25	8/28/25
0%	Acceptance Email to Town of Freedom Code Enforcement confirming production			CP-IS	8/28/25	8/28/25
0%	Production Deployment Checklist drafted and Production Environment setup			CP-IS	8/29/25	8/29/25
0%	Code Enforcement Production Launch			TBD, Town of Freedom Code Enforcement, CP-IS	9/1/25	9/1/25

0%	Code Enforcement Post Go Live, transition to support meeting	TBD, Town of Freedom Code Enforcement, CP-IS Cloudpermit Support	9/8/25	9/8/25
<b>0%</b>	<b>Kick Off - Business Licensing</b>		<b>9/2/25</b>	<b>9/4/25</b>
0%	Town of Freedom provides Business Licensing requirements and kickoff Meeting	CP-IS, TBD	9/2/25	9/2/25
0%	Business Licensing Kick Off Meeting	CP-IS, Town of Freedom Business Licensing	9/3/25	9/3/25
0%	Business Licensing Kick Off Meeting Follow Ups	CP-IS	9/4/25	9/4/25
<b>0%</b>	<b>Business Licensing Workshop</b>		<b>9/8/25</b>	<b>9/8/25</b>
0%	CP-IS reviews applications for Business Licensing	CP-IS, Town of Freedom	9/8/25	9/8/25
0%	Business Licensing Workshop/Discovery	Town of Freedom , CP-IS	9/9/25	9/9/25
<b>0%</b>	<b>Configuration - Business Licensing</b>		<b>9/10/25</b>	<b>9/12/25</b>
0%	Configure Training Environment for Business Licensing and renewals	CP-IS	9/10/25	9/10/25
0%	Configure Business Licensing Templates	CP-IS	9/11/25	9/11/25
0%	Configure Business Licensing Fees	CP-IS	9/12/25	9/12/25
0%	Configure Business Licensing Forms	CP-IS	9/15/25	9/22/25
<b>0%</b>	<b>Training &amp; Testing - Business Licensing</b>		<b>9/15/25</b>	<b>9/30/25</b>
0%	Business Licensing Training 1 - Application, Review, Fees, Issuance, Inspections, Renewals, Admin	CP-IS, Town of Freedom Business Licensing	9/15/25	9/15/25
0%	Town of Freedom Business Licensing testing and config updates	Town of Freedom Business Licensing	9/15/25	9/22/25
0%	Business Licensing Training Session 2 - UAT support and reporting	CP-IS, Town of Freedom Business Licensing	9/23/25	9/23/25
0%	Town of Freedom Business Licensing Final Round of Testing	Town of Freedom Business Licensing	9/23/25	9/30/25
<b>0%</b>	<b>Go Live - Business Licensing</b>		<b>10/1/25</b>	<b>10/3/25</b>
0%	Business Licensing Go/No Go Decision	CP-IS, TBD, Town of Freedom Business Licensing	10/1/25	10/1/25
0%	Acceptance Email to Town of Freedom Business Licensing confirming production	CP-IS, Town of Freedom Business Licensing	10/1/25	10/1/25
0%	Production Deployment Checklist drafted and Production Environment setup	CP-IS	10/2/25	10/2/25
0%	Business Licensing Production Launch	CP-IS, Town of Freedom Business Licensing	10/3/25	10/3/25
0%	Business Licensing Post Go Live, transition to support meeting	CP-IS, Town of Freedom Business Licensing Cloudpermit Support	10/10/25	10/10/25
<b>0%</b>	<b>Land Use Workshop</b>		<b>10/8/25</b>	<b>10/21/25</b>
0%	Town of Freedom provides Land Use application forms	Town of Freedom Land Use	10/1/25	10/8/25
0%	CP-IS reviews information provided by Town of Freedom Land Use and sends planning workshop prep worksheet questions to CP-IS	CP-IS	10/8/25	10/13/25
0%	Town of Freedom Land Use reviews and answers planning workshop prep	Town of Freedom Land Use	10/13/25	10/15/25
0%	CP-IS Schedules internal workshop prep with Cloudpermit Product Manager (Etye)	CP-IS	10/15/25	10/15/25
0%	Cloudpermit Internal Planning Workshop	CP-IS, Product Manager	10/15/25	10/20/25
0%	CP-IS Schedules Planning Workshop with Town of Freedom Land Use	CP-IS	10/20/25	10/20/25
0%	Cloudpermit Planning Workshop	CP-IS, Town of Freedom Land Use	10/21/25	10/21/25
<b>0%</b>	<b>Kick Off - Land Use</b>		<b>10/21/25</b>	<b>10/23/25</b>
0%	Land Use Meeting Scheduled	CP-IS	10/21/25	10/21/25
0%	Land Use Kick Off Meeting	CP-IS, Town of Freedom Land Use	10/22/25	10/22/25
0%	Land Use Kick Off Meeting Follow Ups	CP-IS	10/23/25	10/23/25
<b>0%</b>	<b>Configuration - Land Use</b>		<b>10/24/25</b>	<b>10/29/25</b>
0%	Configure Training Environment for Land Use	CP-IS	10/24/25	10/24/25
0%	Configure Land Use Templates	CP-IS	10/24/25	10/24/25
0%	Configure Land Use Fees/Fines	CP-IS	10/24/25	10/24/25
0%	Configure Land Use Committees, Councils and Meetings	CP-IS	10/27/25	10/27/25
0%	Configure Land Use Forms	CP-IS	10/27/25	10/29/25
<b>0%</b>	<b>Training &amp; Testing - Land Use</b>		<b>10/30/25</b>	<b>11/17/25</b>
0%	Land Use Internal Cloudpermit Mock Training with Product Manager	CP-IS	10/30/25	10/30/25
0%	Land Use Training 1 - Application walkthrough (intake, fees/bills, committees/council meetings, public notices) and Configuration training	CP-IS, Town of Freedom Land Use	10/31/25	10/31/25
0%	Town of Freedom Land Use testing and configuration updates	Town of Freedom Land Use	10/31/25	11/7/25
0%	Land Use Training Session 2 (reports, admin, outstanding items)	CP-IS, Town of Freedom Land Use	11/10/25	11/10/25
0%	Town of Freedom Land Use Final Round of Testing	Town of Freedom Land Use	11/10/25	11/17/25
<b>0%</b>	<b>Go Live - Land Use</b>		<b>11/18/25</b>	<b>11/20/25</b>
0%	Land Use Go/No Go Decision	CP-IS, TBD, Town of Freedom Land Use	11/18/25	11/18/25
0%	Acceptance Email to Town of Freedom Land Use confirming production readiness	CP-IS	11/18/25	11/18/25
0%	Post Go Live Support meeting scheduled	CP-IS	11/18/25	11/18/25
0%	Production Deployment Checklist drafted and Production Environment setup	CP-IS	11/19/25	11/19/25
0%	Land Use Production Launch	CP-IS, Town of Freedom Land Use	11/20/25	11/20/25
0%	Land Use Post Go Live, transition to support meeting	CP-IS, Town of Freedom Land Use Cloudpermit	11/27/25	11/27/25

## Cost Proposal

### Five-Year Cost & Detailed Proposal

#### **Five-Year Cost Breakdown**

5-Year Cost Summary					
Costs	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Software Cost	\$9,350	\$9,724	\$10,113	\$10,416	\$10,833
One-Time Service Fees	\$5,100				
<b>Annual Totals</b>	<b>\$14,450</b>	<b>\$9,724</b>	<b>\$10,113</b>	<b>\$10,416</b>	<b>\$10,833</b>

#### **Notes on Cost**

- User licenses are unlimited at no additional cost.
- Service fees are inclusive of all training, configuration, education
- Subscription costs for software modules are inclusive of all features (mobile, portal, etc.) and inclusive of unlimited support and annual maintenance.
- Subscription costs for software modules are inclusive of all core integrations, including GIS, Online payments (preferred vendors list available upon request)
- Data storage is unlimited at no additional cost.

An aerial photograph of a suburban neighborhood, showing houses, trees, and a road. The image is overlaid with a semi-transparent purple and blue gradient. The text "Cloudpermit" is written in white, with a circular icon containing a dot to its right.

Cloudpermit

Pricing Proposal





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

**Proposal #:** Q-03881-2  
**Customer #:** CUST-0037251  
**Date:** 5/12/2025  
**Expires On:** 6/10/2025  
**Sales Person:** John Lees  
**Sales Person Email:** john.lees@cloudpermit.com  
**Delivery Method:** E-Mail

**Ship To**  
Justin Carlson  
Freedom  
W2004 County Road S  
Freedom, Wisconsin 54131  
United States  
920-788-4548  
administrator@townoffreedom.org

**Bill To**  
Freedom  
W2004 County Road S  
Freedom, Wisconsin 54131  
United States

Subscription

Product Name		Year 1	Year 2	Year 3
Building	Annual Total	USD 4,250	USD 4,420	USD 4,597
Code Enforcement	Annual Total	USD 1,275	USD 1,326	USD 1,379
Land Use	Annual Total	USD 1,700	USD 1,768	USD 1,839
Licensing and Registration	Annual Total	USD 2,125	USD 2,210	USD 2,298
Subscription Total:		USD 9,350	USD 9,724	USD 10,113

Service

Description	Annual Total
Implementation Fee - Building Software Solution	USD 2,550
Implementation Fee - Code Enforcement Software Solution	USD 850
Implementation Fee - Land Use Software Solution	USD 850
Implementation Fee - Licensing and Registration Software Solution	USD 850
Service Total:	USD 5,100

**Customer Total First Year:** **USD 14,450**

Terms & Conditions

Validity of this quote: 30 days from date of creation  
Term: 3 years, billable annually  
Payment Term: Net 30 days from Invoice Date  
Invoicing: Subscription invoice to be sent after contract is signed and then annually.  
Implementation invoice to be sent after contract is signed.  
All stated prices are exclusive of any taxes.

## Annual Subscription Fee

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

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

### Included in the Annual Subscription Fee:

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

## Implementation and Training

### Implementation

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

### Training

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

## Maintenance and Support

### Maintenance

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

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

### Support

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

### Cloudpermit provides the following support resources:

- ✓ Industry standard support ticketing portal for clients
- ✓ Self-help portal for municipal end-users, as well as public applicants (builders/developers)

Cloudpermit's support portal is updated in line with monthly releases, and is available to the public at the following link:

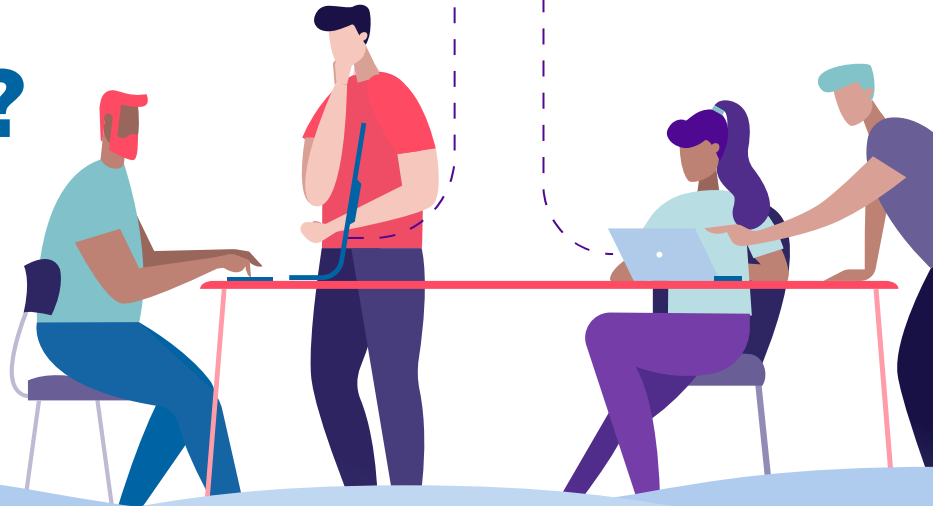
<https://support.cloudpermit.com/support/home>





# Why Cloudpermit?

Community Development  
Made Simple



## Online Access



Perform inspections with or without service in the field, issue applications from your couch, and cut down on time spent at the front counter. All users can access Cloudpermit from their phone, tablet, and computer — just log in.

## Time-Saver



Benefit from a community development platform that doesn't have any frills or added expenses you don't need. It's intuitive and easy for all users to enjoy, even those who aren't good with tech.

## User-Friendly



Your staff, citizens, and workers can do everything online. Staff always get complete applications from their citizens, and no one needs to travel to the office to reinput notes or submit documents.

## Community Growth



Facilitate community growth with increased revenue by speeding up processes. Make your community a better place to live, build, and grow.



# Our Products

Community Development **Made Simple**



## Permitting

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



## Licensing

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



## Planning & Zoning

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



## Code Enforcement

Leverage inspection software to complete assessments in the field, add photos to notes, and schedule inspections online.



## Inspections

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

Don't take our word for it...

## Listen to our partners

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

Henry Hemphill, City Planner  
City of Fruita, Colorado



“Cloudpermit seamlessly integrated with our government’s existing systems and proved to be an excellent fit for our team. We no longer worry about servers or user licenses since this software **hosts our data with unlimited user licenses.**”

Mark Shaw, Code Enforcement Officer  
Seneca County, New York

“If a country boy like me can figure out how to manipulate and navigate Cloudpermit without any training, then the software must be really user-friendly. It took me 20 years to learn how to use other systems **as effectively as I could use Cloudpermit in just one day.**”

Tim Murray, Director of Planning and Development  
City of Brownwood, Texas



## 850+

Customers

## 19M

Inspections

## 18M

Building Permits

## 45M

Citizens



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

## Implementation Timeline

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

Check out our standard implementation schedule below.

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

## Implementation Model

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

### Kickoff:

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

### Workshop:

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

### Configuration:

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

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



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



@Cloudpermit



Cloudpermit.com

## Training & Testing:

The customer will meet with their Implementation Specialist for two standard training sessions.

**Additional Training:** Most customers feel prepared to start using Cloudpermit at the end of their training sessions. Sometimes, additional training is necessary. In this case, customers can order additional training for an additional cost.

## Go-Live:

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

## Milestones & Acceptance Criteria:

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

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

## Change Management:

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

## Additional Services Cost

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

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

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

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



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



@Cloudpermit



Cloudpermit.com

## Where is the data stored?

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

## How is data stored securely?

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

## How often are passwords reset?

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

## How often are backups done?

System backups are done hourly.

## What is Cloudpermit uptime guarantee?

Cloudpermit guarantees 99.99% uptime annually.

## Who owns the data?

The client owns their data, Cloudpermit merely hosts it.

## Is there a limit to the amount of data storage?

There is no data storage limit..

## What are the benefits of Cloudpermit's security?

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

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

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

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

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



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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

## Use Anytime, Anywhere

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

## Accept, Review, and Issue Permits

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

## Receive Complete Permit Applications

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

## Conduct On-site Mobile Inspections

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

## Use Maps Integrated with Your GIS

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

## Change and Modify Workflows

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

## Gain Insight with Reports

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

## Accept Payment

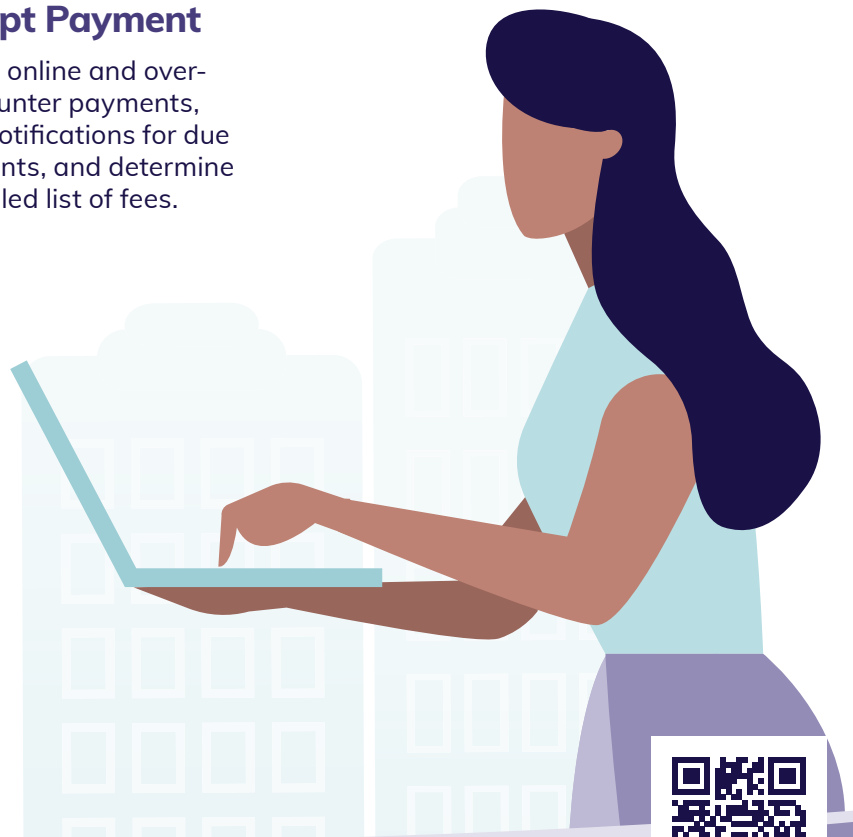
Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

## Keep All Communication in One Place

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

## Get Up and Running Quickly

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



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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

## Use Anytime, Anywhere

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

## Accept Complaints from Citizens

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

## Create Cases and Violations in the Field

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

## Conduct On-site Inspections

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

## View Case History in Chronological Order

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

## Share Photos

Upload photos to cases, violations, and inspections.

## Use Maps Integrated with Your GIS

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

## Accept Payment

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

## Keep All Communication in One Place

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

## Get Up and Running Quickly

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



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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



## Manage and Track Your Short-Term Rentals Program

Accept, review, and approve applications

- ✓ Complete registrations and track payments
- ✓ Track registrants' compliance
- ✓ Complete inspections with a mobile device in the field

## License Dashboard View

Access all the information you need most often on your dashboard as soon as you log into Cloudpermit.

- ✓ Find the most recent applications
- ✓ View upcoming due dates
- ✓ Automate fee calculations
- ✓ Check owner information
- ✓ Verify the status of an application

## GIS Integrated Maps

Seamlessly integrate your GIS for accurate and relevant location information.

- ✓ Find up-to-date property information
- ✓ Plan routes for site visits
- ✓ Separate areas into zones

## Data Import

Easily import past licenses into Cloudpermit.

- ✓ Move existing data into a new system
- ✓ Store past licenses online
- ✓ Keep all information in one place

## Renewal Management

Renew licenses with ease online.

- ✓ Get notified before renewals are due
- ✓ Send automatic email notifications to owners for renewals
- ✓ See dashboard view for upcoming renewals

## Document Management

Manage and sort documents simply and quickly with Cloudpermit.

- ✓ Manage documents for multiple licenses
- ✓ Filter and sort relevant information

## Reporting

Take advantage of custom reports and one-click downloads to learn more about the data surrounding your licenses.

- ✓ Create reports for license renewals
- ✓ Use templates
- ✓ Track outstanding fees
- ✓ Download reports as an Excel or CSV file

## Payment and Fee Calculations

Set up online and over-the-counter payments.

- ✓ Send notifications for due payments
- ✓ Calculate fees for licenses
- ✓ Manage overdue fees



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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

## Online Portal in the Cloud

Log into Cloudpermit whenever and wherever suits you best.

- Use any mobile device via the Internet
- Benefit from storing information in the cloud
- Automatically save and protect information in real-time
- Send direct or group time-stamped messages

## Building Permits and Land Use Permits

Accept and issue a land use permit before accepting a building permit application.

- Building, planning, and zoning departments can work together
- Require land use permits before building permits can be issued
- Allow collaboration between building, planning, and zoning departments

## Applications

Receive complete land use permit applications as citizens must complete all fields before their application can be submitted.

- Send automatic updates when the status of a permit changes
- Accept land use permit and building permit applications in the same software

## GIS Integrated Maps

Seamlessly integrate your GIS for up-to-date information and interactive maps.

- Find accurate property information
- Calculate the size of a property
- Access detailed property information including different layers like heritage areas
- Search permit locations on a map

## Meetings

Manage and sort meetings online.

- Organize meetings with stakeholders such as the board of appeals
- Generate meeting packages with important documentation for board members
- Manage pre-consultation requests
- Create agendas using templates
- Assign applications to upcoming applications

## Public Notice

Follow public notice guidelines with ease.

- Find public notice radius and use links/QR code to send updates to citizens
- Upload public opinion documents
- Track public opinion and set up a list of who needs to be contacted



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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

## Circulation

Send circulation requests to receive responses in real-time.

- Record and organize all responses in the same software
- Enable real-time responses from stakeholders

## Reporting

Determine and review different reports.

- Save commonly used reports with presets
- Download reports as CSV or Excel file

## Configuration

Work with a trained Implementation Specialist to learn how to use the software.

- Modify lists and descriptions
- Access tutorials and support documents
- Configure default review types and descriptions

## Payments

Collect payments from citizens.

- Allow citizens to pay with a credit card
- Let citizens know when their payment is due
- Configure fees and bills

## Conditions

Assign conditions to permits and clear them prior to closing the files.

- Allow collaboration between building, planning, and zoning departments



Cloudpermit is a community development platform. We offer simple and online products for permitting, licensing, planning & zoning, code enforcement, and inspections.



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

# **Request for Proposal: Online Permitting and Payment System for the Town of Freedom, Wisconsin**

The logo for Hey Gov, featuring the words "Hey Gov" in a white, sans-serif font. The text is centered within a light gray, rounded rectangular shape that has a slight drop shadow, giving it a three-dimensional appearance.

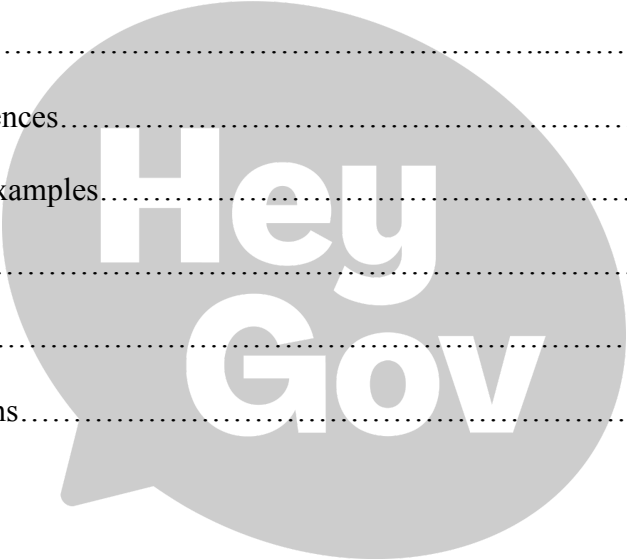
**Hey  
Gov**

**Clerk Tested, Board Approved**

3818 Bay Shore Drive  
Sturgeon Bay, WI 54235  
P: 888.HEYG0V1  
<https://www.heygov.com>

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The logo for Hey Gov is centered in the lower half of the page. It features the words "Hey" and "Gov" in a large, white, sans-serif font, stacked vertically. The text is set against a light gray speech bubble background that has a tail pointing towards the bottom left. The speech bubble is semi-transparent, allowing the table of contents text to be visible behind it.

Hey  
Gov

Mr. Justin Carlson  
Administrator  
Town of Freedom, WI

Dear Mr. Carlson,

Thank you for the opportunity to submit a proposal for an online permitting and payment system for the Town of Freedom. HeyGov offers specialized services, in-depth local government knowledge, and an innovative project team to make your vision a reality.

Our mission is to revolutionize licenses, permits and payments by making them simple, accessible, affordable, easy to use, and citizen friendly. Our systems have improved the way municipalities engage with residents, visitors, and vendors by providing a mobile-friendly portal which showcases the community and its services while furnishing information at the touch of a button. With over 575 customers (and counting!), we have a well-oiled machine, industry-standard methods, and an unlimited supply of creativity. We will simplify your permitting and licensing processes more than you could imagine.

As a former Clerk/Treasurer in Wisconsin, I have first hand experience why a platform such as ours is needed and exactly where it will save your staff and residents time. Municipalities are getting on the “electronic” bandwagon simply because the private sector passed us all by. The expectation for constituents is filling out licenses, permits and applications completely online without paper, all while paying with a credit/debit card or ACH. Speaking of cost...it is always top of mind for us. I have 17 municipal budgets under my belt with each one serving as the hardest one I’ve ever had to do. HeyGov is conscious of municipal budgets across the U.S. and prices our products accordingly.

We are confident your staff and residents will use our tools daily and will see an increase in engagement, compliance, and revenue. Your staff will be more efficient, your residents won’t need to shuffle papers anymore and you’ll become the newest Digital Municipality in the 21st Century. We can’t wait to collaborate with your team so you can better serve your constituents. If you have any questions, do not hesitate to contact me!

With Gratitude,

Chris Astrella, MPA, B.S., WCPC  
Government Content Insider, HeyGov  
chris.astrella@heygov.com

## Services to Local Governments Across the Country

HeyGov is a partner to all municipal departments, whether it's the Clerk, Treasurer, Public Works, Police, Fire or Parks and Recreation Department. We partner with Parks and Recreation to streamline issuing of Annual Pool Passes at City Pools (Mineral Point, WI) Boat Launch Permits (Superior, WI), Building Permits (multiple municipalities), Marina Administration (Sheboygan, WI), Fire Department Entry Forms (multiple municipalities), and building/park/facility reservations through our online calendar and reservation system (too many to list!) The possibilities are endless with HeyGov!

## Who is HeyGov?


HeyGov is the sister company to Town Web Design which has been part of the Door County area in Northeast Wisconsin since 2007. Our President and CEO, Dustin Overbeck, a self-proclaimed 'government nerd' originally created Town Web as a problem-solving tool to ease the lives of local governments and their staff members. At the same time, he wanted to offer online services from the municipality available to constituents, visitors, elected officials, and staff.

When the COVID-19 pandemic hit the country in 2020, Dustin saw what municipal governments were doing to try and adapt to using paper, cash and checks to conduct business all while not allowing people into their buildings. He thought there must be a better way, and developed HeyGov. Now, municipalities can catch up to other Digital Municipalities and be right on par with those in the private sector.












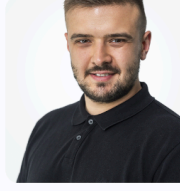
HeyGov boasts a full project management team, together with a development team fluent in WordPress PHP, JavaScript, CSS, and other coding languages. In addition to a creative UX/UI design team, we have a former Clerk/Treasurer who brings real-world experience and a customer focused perspective. Our team is committed to building relationships with our clients and collaborating with them! We customize our digital services for you and your residents, ensuring they are easy to use, supported 24/7/365, and that you'll be proud of.

## Meet the Team!

As mentioned above, our team has experts in design, security, customer service, support, and municipal government. We are here to make your transition from your existing website seamless.

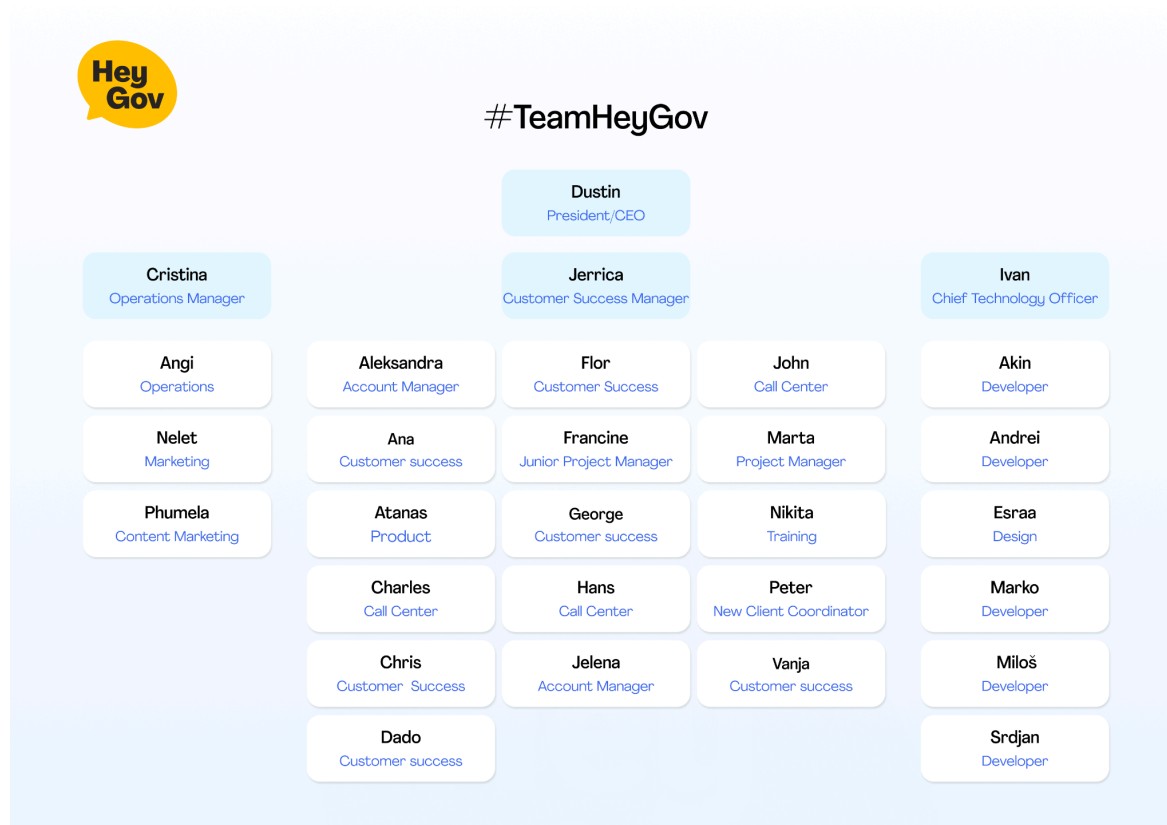


### The People Powering your Experience

 <p><b>Aleksandra Anastopoulos</b> Account Manager • 3 yrs</p>	 <p><b>Atanas Prchev</b> Product Manager • 5 yrs</p>	 <p><b>Chris Astrella, MPA, WCPC</b> Government Content Insider • 3 yrs</p>
 <p><b>Cristina Ducusin</b> Operation Manager • 10 yrs</p>	 <p><b>Dustin Overbeck, MBA</b> President • 17 yrs</p>	 <p><b>Esraa Salah</b> Digital Designer • 2 yrs</p>
 <p><b>Francine Eunekrist</b> Junior Project Manager • 2 yrs</p>	 <p><b>Ivan Cvetkovic</b> Chief Technology Officer • 10 yrs</p>	 <p><b>Jerrica Wagner</b> Customer Success Manger • 6 yrs</p>
 <p><b>Marta Stankovic</b> Project Manager • 4 yrs</p>	 <p><b>Nikita Sangweni</b> Training • 2 yrs</p>	 <p><b>Peter Stankovic</b> New Client Coordinator • 3 yrs</p>



## Organizational Chart



## Our core competencies are:

- **Easy to use** - Our platform is intuitive, easy to use, and enhances your communication with residents and visitors. You can keep anyone informed through emails, text messaging, and they can conduct business after hours! Our forms, permits and licenses are easy for anyone to navigate, and easy for staff to update: no coding knowledge necessary!
- **Unlimited Tier-1 Tech Support.** This is what HeyGov is known for: excellent support services to all customers 24/7. This includes updates to your forms, questions, or guidance - whatever you need, we've got you covered. What differentiates us from everyone else is we don't require you to buy a block of tech support time or charge you by the hour for support or training. There is **never** an extra fee for contacting our support team - **ever**.

We make the transition from paper to digital records seamless and effortless. With nearly two decades of experience in municipal government websites, we've learned what works, how to onboard new customers and apply those same strategies in onboarding you with our Digital Services. We will create your digital forms, permits and licenses based on your actual forms, migrate any data that needs to be and set you up as a digital municipality.

## Onboarding Timeline & Implementation

# HeyGov Onboarding flow

WHAT TO EXPECT WHEN YOU START WITH US

### WEEK 01

#### Today - Welcome

We welcome you to your HeyGov account and invite you to start your digital journey. We openly ask for your goals and pain-points you would like to see solved and you share them with us through email.



### WEEK 2

#### 1st Onboarding

This is when we create your services (payments, forms and rentals). It's the point where we have our first Onboarding session and talk about real life solutions for your municipal challenges by establishing our goals.



### WEEK 3

#### Going live

You will receive ready to be tested services and decide to go live. At this point we take care of the accounting, utility billing integrations & QR Codes.

### WEEK 4+

#### Check in & support

At this point we check in to see if the solutions are helping you. We decide our next steps for the ongoing digitization and support. The goal is to nurture our continued cooperation and make sure the goals we set out are being accomplished.



Our onboarding process is simple, and we're with you every step of the way. If you'd like more details, simply visit this link: <https://heygov.com/post/how-heygov-works-with-customers>

## Receive Unlimited Tech Support

Becoming a digital municipality is not a “one-and-done” process. It requires support and regular maintenance. We provide **unlimited** Tech Support for anything related to the maintenance and update of your digital services. Clients typically require assistance with creation & deletion of content, edits to forms and fields and everything in between. **We do not ever charge you additional fees for Tier 1 tech support! All customers receive fixed pricing for the duration of their contract.**

The following are unlimited in our support package:

- Unlimited Technical support (Tier 1)
- Training for you or your staff (and future staff members)
- Plug-in updates
- Server maintenance
- 24/7 support (available via email and the client dashboard, phone support is available from 7am-4pm Central Time).
- Our extensive knowledge base of PDFs and Youtube videos is updated regularly and training is available to new employees at times convenient for you and for **no additional cost**.

### Value you can be assured of

We want to empower individuals and teams alike. The HeyGov team will be supporting and navigating the entire process with you, from inception, content migration, quality control, and final checks before your permits go live. What's more, our unlimited one-on-one support offers the freedom to do what's best for each department. If your Building Inspectors require additional training, but your Clerk has it all under control...we will train your Building Inspectors accordingly!

### Budget Planning Made Easy with Fixed Prices

HeyGov uses a three-year contract as a template for all of our customers.

- Your first contract will include the cost of your website design (a one-time design and set-up fee) and hosting fees. This amount is paid in Year 1.
- The second year's hosting fee is billed 12 months after the website goes live. This means you do not pay for hosting/maintenance/support during the build phase of your website. We start billing **only** after your site officially goes live.
- The third year's hosting fee is the same amount as the second year.

These fixed, steady prices make it easy to budget. We know how important it is for municipalities to plan for costs in advance and how tight budgets can be! **Please note a 5-year cost estimate is included on the final page of this RFP response.**

## Additional Notes

**Different Levels of Access:** While there must be at least 1 overall administrator, we can tailor access for each user to their specific needs or department. If you'd like to limit the Police Chief to only the Police Department section, we can do that. If you need to limit a Deputy Treasurer to only property taxes we can do that as well. Anyone can be set up with restricted access, unrestricted access or anything in between.

**Integrations with accounting software:** HeyGov partners with many existing accounting and billing systems to streamline your processes. They are: Workhorse, Banyon Data, BS&A, Pelorus, Southern Software, Tyler Technologies (Munis ERP), NEMRC (both for utility bills and taxes) and UB Max. If you use one of these providers the integration is seamless and **free!**

**Log of Changes:** HeyGov logs changes made to the site and who made it. This is available upon request at no charge, just send us an email!

**Ongoing Maintenance & Support:** HeyGov will add/update content for you as needed. **There is no additional charge for these services.**

**Online Payments and Integrations with payment providers:** HeyGov partners with Stripe, a leading and worldwide payment processor to process all financial transactions. We also partner with Paygov.us, MuniciPay and BridgePay for an additional fee. If you require a partnership with Paygov, MuniciPay and/or BridgePay, please let us know so we can quote you an accurate fee. If you already have a relationship with any of the providers please let us know also!

### **Support:**

Training and support are available via remote session between 8am and 4pm Central Time during normal business days. The support team is available for you via email 24/7. Simply email [support@heygov.com](mailto:support@heygov.com) (monitored by a person every hour of every day) and a team member will get back to you ASAP. Phone support is available from 7am-4pm Central Time. We include access to our library of PDF articles and videos showing you how to do anything on HeyGov.

### **Sensitive Data and Security:**

- HeyGov is built using web security best practices (incorporated from Town Web) including Secure Socket Layer (SSL) encryption and 256-bit payment processing through Stripe.
- Whenever your data is in transit between you and us, everything is encrypted, and sent using HTTPS. Within our firewalled private networks, data may be transferred unencrypted.
- Our servers — from power supplies to the internet connection to the air purifying systems — operate at full redundancy. Our systems are engineered to stay up even if multiple servers fail.
- Our software infrastructure is updated regularly with the latest security patches. Our products run on a dedicated network which is locked down with firewalls and carefully monitored. While perfect security is a moving target, we work with security researchers to keep up with the state-of-the-art in web security.
- We have a team dedicated to maintaining your account's security on our systems and monitoring tools we've set up to alert us to any nefarious activity against our domains. To date, we've *never* had a data breach.

## Digital Tools Overview

HeyGov gives Freedom the ability to become a digital municipality by collecting payments, reservations, forms and permits online, with online payments and a digital signature if needed. Our digital tools completely remove paper from your processes, allow for digital collaboration, and save money, time, and resources for your residents and staff. Nearly all tasks which were done in-person or on paper prior to the COVID-19 pandemic can now be completed online! Not only will our digital services streamline the lives of your staff, but they will drive engagement with residents and visitors like never before.



### Here's how:

Facility management is easily done with HeyReserve: Airbnb for municipalities. HeyReserve will replace the binder, dry erase calendar, or hardcover planner you have to track rentals. It can also be used to reserve equipment like kayaks, bikes, or other recreational pieces of equipment you may rent out. We even have customers who use HeyReserve for their pools and youth sports sign-ups!

With HeyLicense, we take your forms and put them online, removing paper from the process. People can fill them out, sign, and pay for them completely online. They come with traceable workflows, are shareable across departments, and are tracked right in the app so there's no need to print "backup" paper copies (unless you want to).

Anyone can report issues with Hey311, our citizen reporting app. Their location is geo-tagged, so they can upload pictures, and track issues they report to you easily. If someone reports an issue outside of your jurisdiction, you can respond back to them immediately in the app and let them know. Hey311 will cut your telephone calls and emails significantly!

With HeyGov Pay, you can accept credit and debit cards online for payments of any kind, at any time! Whether collecting for property taxes, donations, fundraisers, pool passes, or municipal citations, citizens and visitors can make payments through HeyGov Pay quickly, securely, and easily from anywhere at any time! You can absorb the transaction cost, or pass it along to the user, the choice is yours.

**HeyReserve allows you to:**

- ☒ List as many facilities as you like! Each has its own link with amenities, check in/out instructions, and associated costs (you can charge more for non-residents easily)
- ☒ Accept payments online with credit/debit cards or in person with an optional card reader
- ☒ Have residents reserve online instantly or require approval by the office.
- ☒ Manage deposits; they are returned (electronically) upon completion of a rental, after staff approval
- ☒ Block out dates when needed

**HeyLicense allows you to:**

- ☒ Have forms filled out online, even after hours, which are submitted for approval (also can be set up for auto approval, such as boat launches)
- ☒ Share across multiple departments (think background checks for Operator Licenses or plan approval for Building Permits)
- ☒ Track where licenses, forms, and permits are in the approval process (by residents and staff)!
- ☒ Up to 50 forms are included! (anything from FOIA requests, committee sign ups, rec departments, pool passes, employment applications, and everything in between)

**Hey311 allows you to:**

- ☒ Have resident and visitor locations geo-tagged to pinpoint exactly where their issue is
- ☒ Respond quickly and efficiently to requests
- ☒ Assign requests to specific departments
- ☒ Update people on the status of their request in real-time
- ☒ Have a space where the community can submit urgent safety or code violations

**HeyGov Pay allows you to:**

- ☒ Collect payments for multiple departments, forms, donations...anything!
- ☒ Accept payments online or in person via an optional card reader
- ☒ Submit payments securely to your bank every day, even to different bank accounts
- ☒ Use QR Codes to accept payments for anything, anywhere, anytime (boat launches, the Aquatic Center, inside municipal building)

## Past Projects & References

Any of these clients may be contacted as references. We encourage you to reach out to them!

Madelin Dafoe, Clerk  
Town of Pine Plains, NY  
[townclerk@pineplains-ny.gov](mailto:townclerk@pineplains-ny.gov)  
548.398.8600  
[www.pineplain-ny.gov](http://www.pineplain-ny.gov)  
HeyGov customer since 2023  
Population: approximately 2200

Heather Giuliano, Clerk  
Town of Chazy, NY  
[townclerk@townofchazyny.com](mailto:townclerk@townofchazyny.com)  
518.846.7544  
<https://townofchazyny.com/>  
HeyGov customer since 2023  
Population: approximately 4300

Michelle Brewer, Clerk  
Village of Albany, WI  
[villageclerk@villageofalbanywi.gov](mailto:villageclerk@villageofalbanywi.gov)  
608.862.3240  
<https://albanywi.org/>  
HeyGov customer since 2023  
Population: approximately 1000

Christy Skelding, Clerk/Treasurer  
City of Mineral Point, WI  
[cityclerk@cityofmineralpointwi.gov](mailto:cityclerk@cityofmineralpointwi.gov)  
608.987.2361  
<https://cityofmineralpoint.com/>  
HeyGov customer since 2022  
Population: approximately 2500

Jenny Salvo, Clerk  
City of Milton, WI  
[jsalvo@milton-wi.gov](mailto:jsalvo@milton-wi.gov)  
608.868.6900  
<https://www.milton-wi.gov/>  
HeyGov customer since 2023  
Population: approximately 5500

The logo for Hey Gov is a large, light gray speech bubble. Inside the bubble, the words "Hey" and "Gov" are written in a large, white, sans-serif font. "Hey" is on the top line and "Gov" is on the bottom line, both centered within the bubble.

Hey  
Gov



## Town Of Freedom Pricing Table

1360 Regent St, # 355  
Madison, WI 53715  
Toll Free: 877-995-TOWN

### Town Web's Digital Governance "HeyGov"

### Digital Governance Bundle Of Tools

Onboarding Meeting	Included	✓
Launch Training Session	Included	✓
<b>Digital Governance: Setup Fee</b>	<b>\$1,200 One-Time</b>	
Citizens' Requests & Reports App "Hey311"	Included	✓
<b>"Hey311" App: Ongoing Fee</b>	<b>\$1,200.00/Year</b>	
Credit Card Payments	Included	✓
Payment Portals Submissions Storage (With View Of All Bills Generated/Paid/Overdue)	Included	✓
Departments/Users/Bank Account Management	Included	✓
Up To 10 Forms Digitized For You	Included	✓
Form Builder With Up To 50 Forms (Unlimited Form Submissions)	Included	✓
Workhorse Integration	Included	✓
<b>"HeyGov Pay" &amp; "HeyLicense": Ongoing Fee</b>	<b>\$5,800.00/Year</b>	
Up To 10 Meetings Per Month	Included	✓
Up To 10 Boards/Departments & Team Members	Included	✓
Collaborative Agenda Builder	Included	✓
<b>"ClerkMeetings" Growth: Ongoing Fee</b>	<b>\$3,000.00/Year</b>	
"HeyGov" Free Support <small>Manage Emergency Situations With Payments, Bugs Fixes, Critical Issues Addressing, 2 Trainings Per Year, Access To The Knowledge Base</small>	Always Included	✓
<b>Optional:</b> "HeyGov" Standard Support Package <small>Everything Offered In The "Free" Option + Faster Response Time (4h Response Time During Working Hours) +2 Trainings Per Year (4 In Total)</small>	<b>+\$1,200.00/Year</b>	✓
<b>Optional:</b> "HeyGov" Premium Support Package <small>Everything Offered In The "Standard" Option + Extremely Fast Response Time (2h Response Time During Working Hours), +2 Trainings Per Year (6 In Total), + Custom Video Replies To Support Tickets</small>	<b>+\$2,400.00/Year</b>	✓

# Use Case Examples

You can use HeyGov for whatever you would like but here are some of our most common use cases!

**Hey Gov**



## Payment Portals

- Daily Boat Launch Pass
- Utility Bill Payments
- Property Tax Payments
- Parking Fees
- Citation Payments
- Donations
- Pool Pass
- Cemetery Plots
- Event Tickets
- Rec Payments



## Licensing & Permitting

- Annual Boat Launch Pass
- Dog Licensing
- Business Licenses
- Building Permits
- Liquor Licensing
- Special Event Permits
- Rec Sport Registrations
- Operator's (Server) License
- Utility Service Request Form
- Short Term Rental Applications



## Reservations

- Park Pavilion/Shelter
- Town Hall
- Rec Center Rooms
- Sports Fields (eg. Baseball Field)
- Library Meeting Rooms



## 311

- Resident Questions
- Resident Issue Reporting
- 2-way Communication with Residents
- Department Task Manager

Integrates with

 banyandata

 BS&A SOFTWARE

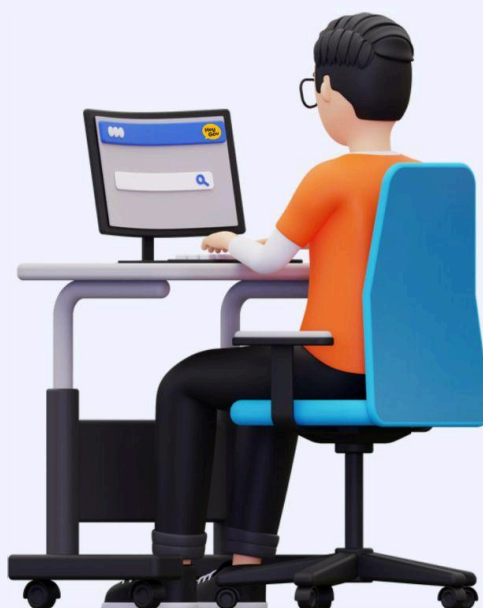
 Pelorus

 SOUTHERN SOFTWARE, INC.  
an employer owned company


 tyler technologies

 WORKHORSE SOFTWARE SERVICES, INC.

and more...



 Download on the  
App Store

 GET IT ON  
Google Play

## Our Newest Tool...ClerkMinutes!

If you are already recording your meetings, why not take your minute taking to the next level, and get your minutes done in...literally minutes! If you're not recording your meetings, the time to start is now and simplify your minute taking process!

### Create Meeting Minutes, in Minutes!



By harnessing the power of AI, ClerkMinutes will complete the long task of meeting minutes in a fraction of the time. Here's how:

1. Upload the meeting agenda (PDF format)
2. Upload the meeting recording - and upload or zoom/youtube/teams link will work
3. View the transcript and assign speakers
4. Generate your minutes and customize them to your specifications
5. Download as a Word document or PDF
6. Upload to the website and you're finished in minutes!

In just over 14 months, we have signed up over 160 customers to complete their minutes quicker than ever before. ClerkMinutes frees up Clerks to do other more complex and "brain intensive" work rather than spending hours working on minutes.

A survey put out by the International Institute of Municipal Clerks in 2024 found over 40% of the Clerk who responded spend five to ten hours per week on meeting prep (including minutes) and 20% spend ten to twenty hours per week. Take advantage of the tools we offer to reduce the workload and focus on serving your constituents more efficiently with ClerkMinutes! Finish your minutes...in minutes!

We have a number of customers in the midwest, and in Wisconsin! I've listed them below so you can reach out to see how much time ClerkMinutes is saving them!

- Town of Rib Mountain
- City of Burlington
- City of Waupaca
- Village of Lone Rock
- Town of Forestville

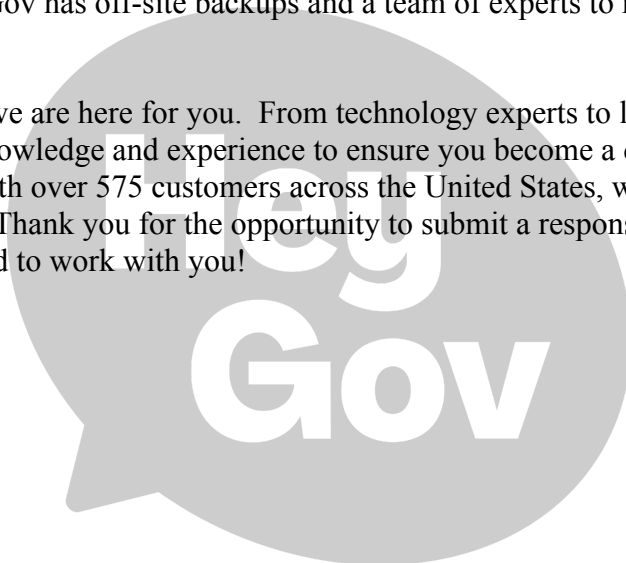
## Conclusion

In short, digital services may have been a luxury five years ago, but now the public expects to conduct as much business as possible online with easy electronic payments. You will be able to market and educate the world about everything Freedom has to offer including the Freedom Area Historical Society, the VFW Post, Rickert Park and more.

With our unlimited support, we'll be there for you no matter what! You'll never have to worry about "surprise" bills because a form isn't working or a payment didn't process correctly. While we can't predict the future, we are cognizant of municipal pricing and budgeting. Additionally, if you need to roll out your entire project in phases (for onboarding or budgeting reasons) we are flexible to your needs! If you need to pay over two different budget years, please let us know as we can accommodate that as well.

Nothing is hack proof, but we use the latest security measures to ensure if something happens, we can handle it. HeyGov has off-site backups and a team of experts to respond just in case we need to.

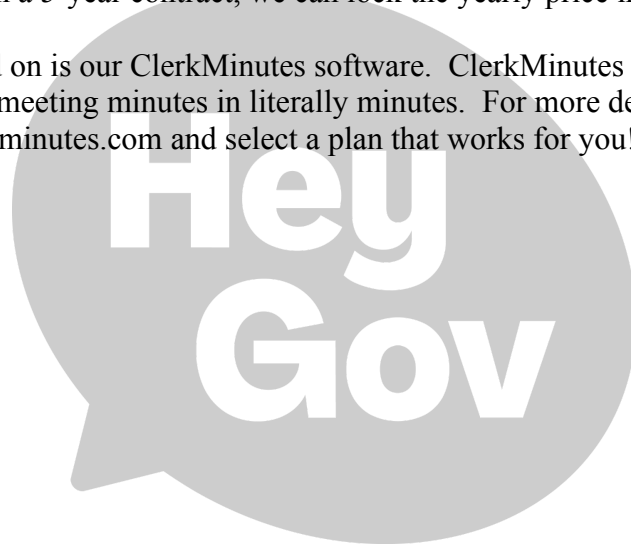
Speaking of our team, we are here for you. From technology experts to local government experts, we have the knowledge and experience to ensure you become a digital municipality at an affordable price. With over 575 customers across the United States, we are here to serve you and your constituents. Thank you for the opportunity to submit a response to your project, we are humbled and excited to work with you!



## Exceptions & Notations

While we can accomplish almost every goal or feature outlined in the RFQ, there are a few areas that are either currently under construction or not a part of what we offer at this time. They are:

- HeyGov does not use subcontractors.
- Workhorse and HeyGov are already set up to integrate. You can download files from HeyGov and upload them seamlessly to Workhorse!
- The vast majority of our customers are within a population range of 1,000 to 10,000, with most of them falling on either side of your population (give or take 1,000). We have a long history of supporting smaller and medium sized municipal governments!
- The Town's data is always going to be the town's data. If service is discontinued, Freedom will have the opportunity to download data from the HeyGov system. Proprietary features and modules, however, are not downloadable.
- Pricing for what is required in the RFP includes Hey311, HeyGov Pay and Hey License. If willing to sign a 5-year contract, we can lock the yearly price in of \$7000/year for 5 years.
- An optional add on is our ClerkMinutes software. ClerkMinutes harnesses the power of AI to complete meeting minutes in literally minutes. For more details and pricing, please visit [www.clerkminutes.com](http://www.clerkminutes.com) and select a plan that works for you!



## Granicus Proposal for Freedom, WI

### ORDER DETAILS

**Prepared By:** Brian Ondrako  
**Phone:**  
**Email:** brian.ondrako@granicus.com  
**Order #:** Q-444080  
**Prepared On:** 08 May 2025  
**Expires On:** 20 Jun 2025

### ORDER TERMS

**Currency:** USD  
**Payment Terms:** Net 30 (Payments for subscriptions are due at the beginning of the period of performance.)  
**Period of Performance:** The term of the Agreement will commence on the date this document is signed and will continue for 60 months.

## PRICING SUMMARY

The pricing and terms within this Proposal are specific to the products and volumes contained within this Proposal.

One-Time Fees			
Solution	Billing Frequency	Quantity/Unit	One-Time Fee
SmartGov Training	Upon Delivery	1 Each	\$3,040.80
SmartGov Custom Implementation	Upon Delivery	1 Each	\$0.00
Existing Merchant Connector Configuration	Upon Delivery	1 Each	\$1,575.00
Project Management - SmartGov	Upon Delivery	1 Each	\$3,154.56
Map Connector Configuration	Upon Delivery	1 Each	\$1,312.50
Parcel Connector Configuration	Upon Delivery	1 Each	\$3,281.25
Portal Configuration	Upon Delivery	1 Each	\$1,312.50
Fees Configuration (Pages)	Upon Delivery	1 Each	\$557.55
General Config	Upon Delivery	1 Each	\$2,625.00
Workflow template customization	Upon Delivery	1 Each	\$4,825.80
Financial Export Connector Configuration	Upon Delivery	1 Each	\$2,500.00
SUBTOTAL:			\$24,184.96

New Subscription Fees			
Solution	Billing Frequency	Quantity/Unit	Annual Fee
SmartGov - Enterprise	Annual	1 Each	\$18,237.45
SmartGov Code Enforcement	Annual	1 Each	\$0.00
SmartGov Licensing	Annual	1 Each	\$0.00
SmartGov Permitting	Annual	1 Each	\$0.00
SmartGov Connector Merchant	Annual	1 Each	\$1,440.60
SmartGov Connector Financial	Annual	1 Each	\$1,440.60
SUBTOTAL:			\$21,118.65





## FUTURE YEAR PRICING

Solution(s)	Period of Performance			
	Year 2	Year 3	Year 4	Year 5
SmartGov - Enterprise	\$19,149.32	\$20,106.79	\$21,112.13	\$22,167.73
SmartGov Code Enforcement	\$0.00	\$0.00	\$0.00	\$0.00
SmartGov Licensing	\$0.00	\$0.00	\$0.00	\$0.00
SmartGov Permitting	\$0.00	\$0.00	\$0.00	\$0.00
SmartGov Connector Merchant	\$1,512.63	\$1,588.26	\$1,667.67	\$1,751.06
SmartGov Connector Financial	\$1,512.63	\$1,588.26	\$1,667.67	\$1,751.06
<b>SUBTOTAL:</b>	<b>\$22,174.58</b>	<b>\$23,283.31</b>	<b>\$24,447.47</b>	<b>\$25,669.85</b>

## PRODUCT DESCRIPTIONS

Solution	Description
SmartGov - Enterprise	Annual subscription to SmartGov software for: Permitting, Licensing, and Code Enforcement. Subscription includes the Public Portal.
SmartGov Code Enforcement	Annual subscription for SmartGov Code Enforcement Module for managing service requests and complaints.
SmartGov Licensing	Annual subscription for SmartGov Licensing Module for contractor registration, rental registration, business licensing.
SmartGov Permitting	Annual subscription for SmartGov Permitting Module for building and planning permits, inspections, and contacts.
SmartGov Connector Merchant	Connection to one merchant in the back office and/or portal from a list of available options. Subscriber remains responsible for the relationship with the provider.
SmartGov Training	Includes up to two (2) hours of User Acceptance Training to prepare primary users for Validation, focused on navigation and testing best practices. Go-Live training will span a one (1) week period, provided in three (3) hour sessions focused on Permit/Application Intake, Review, Inspections and Code Enforcement processes (as needed).
SmartGov Custom Implementation	SmartGov Configuration based on implementation options selected.
Existing Merchant Connector Configuration	Configure merchant connection. Test and troubleshoot connection during test process.  Subscriber to provide the required linking information for Company to complete the setup. These will often include connection URLs, Login IDs, and Transaction Keys. Requirements vary slightly depending on the selected Merchant.  SmartGov will not test in Production environments.

Solution	Description
Project Management - SmartGov	<p>Project Management: Company Project Manager will act as an extension of the Subscriber's team and manage the implementation from start to finish. The Subscriber will have access to a personalized timeline which will be reviewed on a regular cadence. The Project Manager will partner with the Subscriber to coordinate all services, management of the project timeline, and help identify risks and/or issues.</p> <p>Project Management Services include:</p> <ul style="list-style-type: none"> <li>• Project planning and kickoff meetings.</li> <li>• Project schedule developed and maintained according to the SOW tasks, deliverables, dependencies, and resource assignments.</li> <li>• Status reporting and coordination of status meetings, bi-weekly, or as required.</li> <li>• Schedule monitoring and scope management.</li> <li>• Risk Management planning to identify, analyze, and mitigate risks.</li> <li>• Action Item and decision tracking, as well as resolving and escalating issues.</li> <li>• Change control management and issue tracking.</li> <li>• Company project resource management.</li> <li>• Verify product and deliverable acceptance with Subscriber.</li> <li>• Facilitating transition to Support.</li> <li>• Company's Project Manager will serve as the single point of contact for the project related to this SOW.</li> </ul>

Solution	Description
Map Connector Configuration	<p>Configure subscribers ESRI GIS layers into SmartGov Troubleshooting the incoming data Train client on how to maintain the service in SmartGov.</p> <p>MAP/GIS Connector:</p> <p>Company will connect to ESRI Map Service provided by Subscriber and secured by a publicly trusted certificate issued by a Certificate Authority.</p> <p>Subscriber is responsible for contracting separately with ESRI map service provider and ESRI configuration.</p> <p>SmartGov Requirements for Map Connector Integration: ArcGIS for Server 10.4 or ArcGIS for server Enterprise Standard 10.7.1 (OR) ArcGIS Online. Subscriber Map Service must be publicly accessible and require no user authentication of any kind. The Map Service must include a parcel layer with a designated field having parcel numbers that exactly match those provided in the Parcel Connector source data (this layer may be the same as that provided for the Parcel Connector if no authentication is required for access). Support for Feature, Tiled, and Web Map Services is not included. Custom base maps are not supported. Base maps from the ESRI base map library will be available for use.</p> <p>The following base maps are currently included (subject to change): Imagery Imagery Hybrid Streets Topographic Navigation Streets (Night) Terrain with Labels Light Gray Canvas Dark Gray Canvas Oceans National Geographic Style Map Open Street Map Charted Territory Map Community Map Navigation (Dark Mode) Newspaper Map Human Geography Map Human Geography Dark Map Modern Antique Map Mid-Century Map Nova Map Colored Pencil Map Firefly Imagery Hybrid</p>

Solution	Description
	USA Topo Maps

Solution	Description
Parcel Connector Configuration	<p>Company will configure EITHER a Delimited Parcel Job OR ARCGIS Parcel Job on behalf of the Subscriber.</p> <p>Configure Subscribers parcel fields into SmartGov. Troubleshooting the incoming data and providing recommendations for Subscriber to resolve data gaps. Train Subscriber on how to maintain the service in SmartGov.</p> <p>Delimited File – A delimited file may be uploaded to the job at runtime. The delimited file option supports a single address for each individual parcel. Subscriber must use the template provided by Company.</p> <p>Parcel Layer – A parcel layer must be accessible by URL through an ESRI REST service. A secondary address-only layer may also be provided for parcels that have more than one address. The layer(s) must be publicly accessible and may be secured with a username and password.</p> <p>Subscriber is responsible for obtaining, cleaning, and maintaining all parcel data within the delimited file and/or ESRI Rest service.</p> <p>The configured parcel job will be available for Subscriber to run on-demand after go-live. The Parcel Layer Job can be set to run daily, weekly, monthly, or annually defined by how often Subscriber intends to update the Rest Service.</p> <p>Parcel source data (delimited file or parcel layer) must include the following fields, at a minimum:  Parcel Number  Primary Situs Address  Primary Situs City  Primary Situs State  Primary Situs Zip Code  Owner Name  Owner Street Address  Owner City populated for USA addresses only  Owner State populated for USA addresses only  Owner Zip Code populated for USA addresses only  International Indicator with a value of "Y" for any owner address outside of the USA  International line including the full regional equivalent of the city, state and zip code for any owner address outside of the USA</p> <p>Inclusion of the following additional fields is recommended:  Parcel center point latitude in decimal degrees  Parcel center point longitude in decimal degrees</p> <p>If using a secondary address layer with the ARCGIS Parcel job, the address layer must contain the following fields:  Parcel Number</p>

Solution	Description
	<p>Secondary Situs Address Secondary Situs City Secondary Situs Zip Code</p> <p>Inclusion of the following additional fields is recommended for the secondary address layer: Address point latitude in decimal degrees Address point longitude in decimal degrees</p>
Portal Configuration	<p>Company will customize Subscriber's Portal by:</p> <ul style="list-style-type: none"> <li>• Loading Subscriber logo.</li> <li>• Exposing all permits/business licenses identified in Configuration workbook in which citizens will have access.</li> <li>• Advising on best practices for public release timeline and access code configuration.</li> <li>• Load Subscriber custom verbiage into limited fields.</li> <li>• Provide the access URL (Uniform Resource Locator) for Subscriber to add link to jurisdiction web pages.</li> </ul> <p>Includes consultant-led end-to-end walkthrough and demonstration of UAT/Validation process to Subscriber to confirm functionality meets configuration requirements.</p>
Fees Configuration (Pages)	<p>Subscriber Fees configured based on provided Fee schedule and according to Configuration Workbook. Based on Subscriber fee schedule, defined in the Order Form, Company will:</p> <ul style="list-style-type: none"> <li>• Setup Subscriber fee code calculations.</li> <li>• Load Subscriber FMS (Financial Management System) / GL (General Ledger Code) (according to Configuration Workbook).</li> <li>• Load Subscriber Valuation table (according to Configuration Workbook or ICC (International Chamber of Commerce) table). Setup Subscriber fixture costs (according to Configuration Workbook).</li> <li>• Load other Subscriber custom attributes / details as required for Subscriber fee calculations (according to Configuration Workbook).</li> </ul>

Solution	Description
General Config	<p>General Configuration: As part of the General Configuration, Company will:</p> <ul style="list-style-type: none"> <li>• Create Subscriber database with best practice defaults.</li> <li>• Provide Validation environment access to Subscriber.</li> <li>• Load Subscriber users with Company standard permissions (according to Configuration Workbook).</li> <li>• Configure system values (locality, time zone, header and footer detail, standard report settings).</li> <li>• Load Client Code References/Violation types (according to Configuration Workbook).</li> <li>• Set up General Ledger accounts.</li> <li>• Load Subscriber logo.</li> <li>• Provide access to over 100 reports and output document templates. Subscriber receives credentials for environment when initial configuration items under General Configuration deliverable are completed.</li> </ul>
Workflow template customization	<p>Workflow Template Configuration: Company will configure process templates as defined in the Business Process Analysis phase for each department in scope: Building/Permits, Code Enforcement, Licensing and/or Recurring Inspections. Company will:</p> <p>Load Subscriber Code References/Violation types (according to Configuration Workbook).</p> <p>Load custom attributes/details within the limited fields available (not associated with fees, according to Configuration Workbook).</p> <p>Configure workflow to meet business requirements defined in Configuration Workbook.</p> <p>Consultant-led end-to-end walkthrough and demonstration of UAT/Validation process to Subscriber to confirm functionality meets configuration requirements.</p> <p>Completed upon configuration according to documentation in the Configuration Workbook Percentage: 100%</p>



Solution	Description
SmartGov Connector Financial	<p>The SmartGov Financial Connector outputs a financial extract with a pre-determined format which may be written to the customer's FTP site, if desired, to facilitate automated external processing of the file. The customer may request the use of an alternate delimiter if a comma is not acceptable. The financial extract job may be run on demand or scheduled to run on a consistent basis (e.g., daily, weekly, monthly, etc.). Companion reports designed for reconciliation and extract verification are also available.</p>

Solution	Description
Financial Export Connector Configuration	<p>Configure financial export according to subscribers FMS (financial management system) as provided by Subscriber.</p> <p>Train Subscriber on how to export and set scheduler.</p> <p>Company will customize the configuration of the export to match Subscriber financial system input needs as documented. Available customizations include:</p> <p>Additional data fields  Altered order of column information  Alternate delimiter or fixed width formatting  A header line is not part of the export.  Financial Connector does not connect directly with any Financial Management System.  If Subscriber provides a local (FTP) File Transfer Protocol, the Financial Connector can automatically upload to the defined FTP destination.</p> <p>By default, financial extract jobs are pre-configured and the included configuration of the Receipt Extract job will produce a comma-delimited file with the following data points:  Receipt Number  Receipt Date  FMS/GL Code  Fund  GL Account  Fee Amount Paid  Fee Code Name  Permit/License/Case Number  Payer Name</p> <p>The included configuration of the Receipt Extract – FMS/GL Summary job will produce a comma-delimited file with the following data points:  FMS/GL Code  Fund  GL Account  Fee Amount Paid</p> <p>The file output of the financial extract may be written to the customer's FTP site, if desired, to facilitate automated external processing of the file. The customer may request the use of an alternate delimiter if a comma is not acceptable.</p> <p>The financial extract job may be run on demand or scheduled to run on a consistent basis (e.g., daily, weekly, monthly, etc.). Companion reports designed for reconciliation and extract verification are also available.</p>



## TERMS & CONDITIONS

- This quote, and all products and services delivered hereunder are governed by the terms located at <https://granicus.com/legal/licensing>, including any product-specific terms included therein (the "License Agreement"). If your organization and Granicus has entered into a separate agreement or is utilizing a contract vehicle for this transaction, the terms of the License Agreement are incorporated into such separate agreement or contract vehicle by reference, with any directly conflicting terms and conditions being resolved in favor of the separate agreement or contract vehicle to the extent applicable.
- If submitting a Purchase Order, please include the following language: The pricing, terms and conditions of quote Q-444080 dated 08 May 2025 are incorporated into this Purchase Order by reference and shall take precedence over any terms and conditions included in this Purchase Order.
- This quote is exclusive of applicable state, local, and federal taxes, which, if any, will be included in the invoice. It is the responsibility of Freedom, WI to provide applicable exemption certificate(s).
- Any lapse in payment may result in suspension of service and will require the payment of a setup fee to reinstate the subscription.

## BILLING INFORMATION

<b>Billing Contact:</b>		<b>Purchase Order Required?</b>	<input type="checkbox"/> - No <input type="checkbox"/> - Yes
<b>Billing Address:</b>		<b>PO Number:</b> <i>If PO required</i>	
<b>Billing Email:</b>		<b>Billing Phone:</b>	

**If submitting a Purchase Order, please include the following language:**

*The pricing, terms, and conditions of quote Q-444080 dated 08 May 2025 are incorporated into this Purchase Order by reference and shall take precedence over any terms and conditions included in this Purchase Order.*

## AGREEMENT AND ACCEPTANCE

By signing this document, the undersigned certifies they have authority to enter the agreement. The undersigned also understands the services and terms.

Freedom, WI	
<b>Signature:</b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Date:</b>	



---

## Proposal for Freedom, Wisconsin

### RFP for Online CRM Solution for Online Permitting & Payment System

May 16, 2025

**Prepared by**

Kara McFall, Manager

Online Solutions, LLC (CitizenServe)

1101 E Warner Rd, Suite 160

Tempe, Arizona 85284

Phone: 800.325.9818 x709

Fax: 800.325.9818

[proposals@citizenserve.com](mailto:proposals@citizenserve.com)

# COVER LETTER

May 8, 2025

Mr. Justin Carlson, Town Administrator  
W2004 County Highway S.  
Freedom, WI 54131

Dear Mr. Carlson,

Online Solutions, LLC (Citizenserve) is pleased to submit this response to the Town's Request for Proposal for Online CRM Solution for Online Permitting & Payment System. Citizenserve has 22 years of experience solving the problems the Town seeks help with and helping customers of similar size. We have offered citizenserve® as a Software-as-a-Service solution with accompanying services for public sector customers from the beginning. Our existing client base consists of towns, cities, counties, and other municipalities throughout the United States that have community development functions. We have over 300 customers, including customers in the State of Wisconsin.

After reviewing the Town's scope of work, we believe we offer a strong solution for the Town's requirements and the best implementation methodology to ensure lasting success. Citizenserve is a low-code software and service solution for community development that covers all aspects of application processing, permitting, inspections, planning & zoning, code enforcement, licensing, and citizen request management. The software encompasses internal functions and provides a user-friendly portal to enable electronic relationships with contractors, citizens, and businesses involved in community development processes. Citizenserve offers profound opportunities for efficiency gains, increased service for constituents, and cost savings.

Citizenserve offers exceptional value for municipalities with smaller populations. We have over 50 customers with populations under 10,000 and have included several as references. Our automated solution reduces the burden on your staff while increasing the level of service you provide to your constituents. We provide unlimited support with every subscription, eliminating the need for our customers to hire a system administrator or engage their own scarce resources. Our support covers issue resolution, new configurations, unlimited custom reports, and unlimited training. We resolve and close 84% of our support requests within one day, enhancing the effectiveness of your staff.

Citizenserve's unique background provides proven experience and reliability for our customers:

- Our automated workflows, notifications, and document management ease the burden on your staff, freeing them from the time-consuming process of manually overseeing your permit and license applications and code cases. Your constituents benefit from enhanced communication and drastically reduced application cycle times.
- Our dedication to continual improvement and the integration of new technologies like artificial intelligence (AI) ensure that our solution continues to evolve to meet the needs of our customers and their constituents. We provide updates and enhancements to the software monthly.
- Our unlimited support provides timely assistance when your staff needs it. Other vendors measure the closure of support tickets in weeks; with Citizenserve, you will receive a response from a support team member within an hour (an average of 17 minutes for standard request, 6 minutes for urgent requests) and resolution within hours. Over 84% of our support requests are resolved and closed on the same day they are opened.
- We do not manage by change order. We use an agile implementation methodology that encourages exploration and welcomes changes in requirements. We know from experience that knowledge gained through a project leads to new ideas, improvements, and oftentimes a whole new approach.
- Our software has been built organically for 22 years and continually improved based upon customer enhancement requests, changes in technology, and ongoing feedback from our customers. We have never acquired another company or product; all growth has been through thoughtful and continual improvement of the product.

We look forward to sharing how Citizenserve can help to meet the requirements of the Town. The pricing in this proposal is valid until May 16, 2026.

Sincerely,



Kara McFall, Manager

Online Solutions, LLC (Citizenserve)

1101 E Warner Rd, Suite 160, Tempe, AZ 85284

800-325-9818 x709

[proposals@citizenserve.com](mailto:proposals@citizenserve.com)



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# SECTION 1 – CITIZENSERVE BACKGROUND AND QUALIFICATIONS

Citizenserve is located in Tempe, Arizona and was started as an internet software service in 2003. Citizenserve has 22 years of experience applying automation to address community development challenges and solving the problems the Town seeks help with. We will leverage this experience to ensure that the Citizenserve team fully understands the Town's requirements and provides functionality that addresses the full spectrum of Town users and needs. Community development software and services are the only software and services the company has ever offered, and we have focused exclusively on public sector customers. There have been no acquisitions in the company history; all growth has been organic under the same company leadership. The names *Online Solutions* and *Citizenserve* have been used since inception.

We have offered citizenserve as a Software-as-a-Service solution with accompanying services from the beginning. The Citizenserve software is only provided as a cloud-based subscription. When Citizenserve was started as an internet software service in 2003, the model was uncommon; we were among the first to identify the benefit for community development customers of an easily accessible cloud-based solution accompanied by unlimited support. Updates and enhancements to the software are provided once to twice monthly and are included in all subscriptions at no additional charge.

A Citizenserve subscription also includes major upgrades with accompanying change management training, which occur every few years. We are currently rolling out a new version of our public portal that provides improvements and efficiencies for our customers' constituents. We have also recently implemented AI-driven configuration tools to build permit and license applications and code cases, dramatically reducing the amount of time required to implement our modules.

There are over 300 jurisdictions and thousands of community development professionals using Citizenserve, including over 50 customers with populations less than 10,000. Each of these customers faced similar challenges to those facing the Town, and with Citizenserve have completed successful projects. Most of our customers require integration to external systems such as GIS and payment processors and the tailoring of permits, projects, licenses, workflows, fee schedules, certificates, enforcement codes, reports, user roles, and other attributes unique to each customer. Many of our customers migrated from paper-based processes. We have

extensive experience implementing the software, tailoring it through configurations to the specific needs of the customer, completing and testing system integrations, and thoroughly training users to ensure successful adoption.

We strive to be easy to work with, and new customers are often referred by existing customers. There have been no customer disputes, litigation, or failed implementations in the company's history. Our unlimited support model extends our relationships with our customers, ensuring that when they have a question or issue, we are available to provide timely assistance and problem resolution. We resolve over 84% of support requests on the same day the request is submitted. In addition to assisting with support requests, we also offer unlimited user training after launch for the full life of the subscription. Our unlimited support and training eliminate the stress of changing to a new system and ensure that all your stakeholders are supported when they require assistance.

Citizenserve has the solution to meet the requirements of the Town, the experience to ensure a smooth and efficient implementation, a lengthy background with small municipal governments, and the support model to ensure continuing success.

## SECTION 2 – CITIZENSERVE SOLUTION

Citizenserve is a browser-based Software-as-a-Service (SaaS) application that was first released in 2003 and is now implemented for over 300 customers, including multiple Wisconsin municipalities. Citizenserve is a comprehensive community development solution that includes permitting, planning & zoning, code enforcement, licensing, request tracking, and an integrated online portal. All modules are integrated and included in the subscription. Citizenserve is device and browser independent; it can be accessed from any desktop, laptop, tablet, phone, or other mobile device, including both iOS and Android devices. Citizenserve can be used on cellular and wireless networks from any location. Citizenserve's automated workflows and integrated document management enable paperless processing for both staff and customers.

The software has been built organically and continually improved based upon customer enhancement requests, changes in technology, the changing security landscape, and ongoing feedback from our customers. Our software has been designed from the beginning to provide efficient processing for staff, expanded access and ease-of-use for the public, and increased satisfaction among all users, both staff and the public. We release updates and enhancements once to twice monthly; we are constantly working to improve the functionality and ease of use of citizenserve. There is only one version of the software that all customers are on – no one gets left behind on an old, unsupported version.

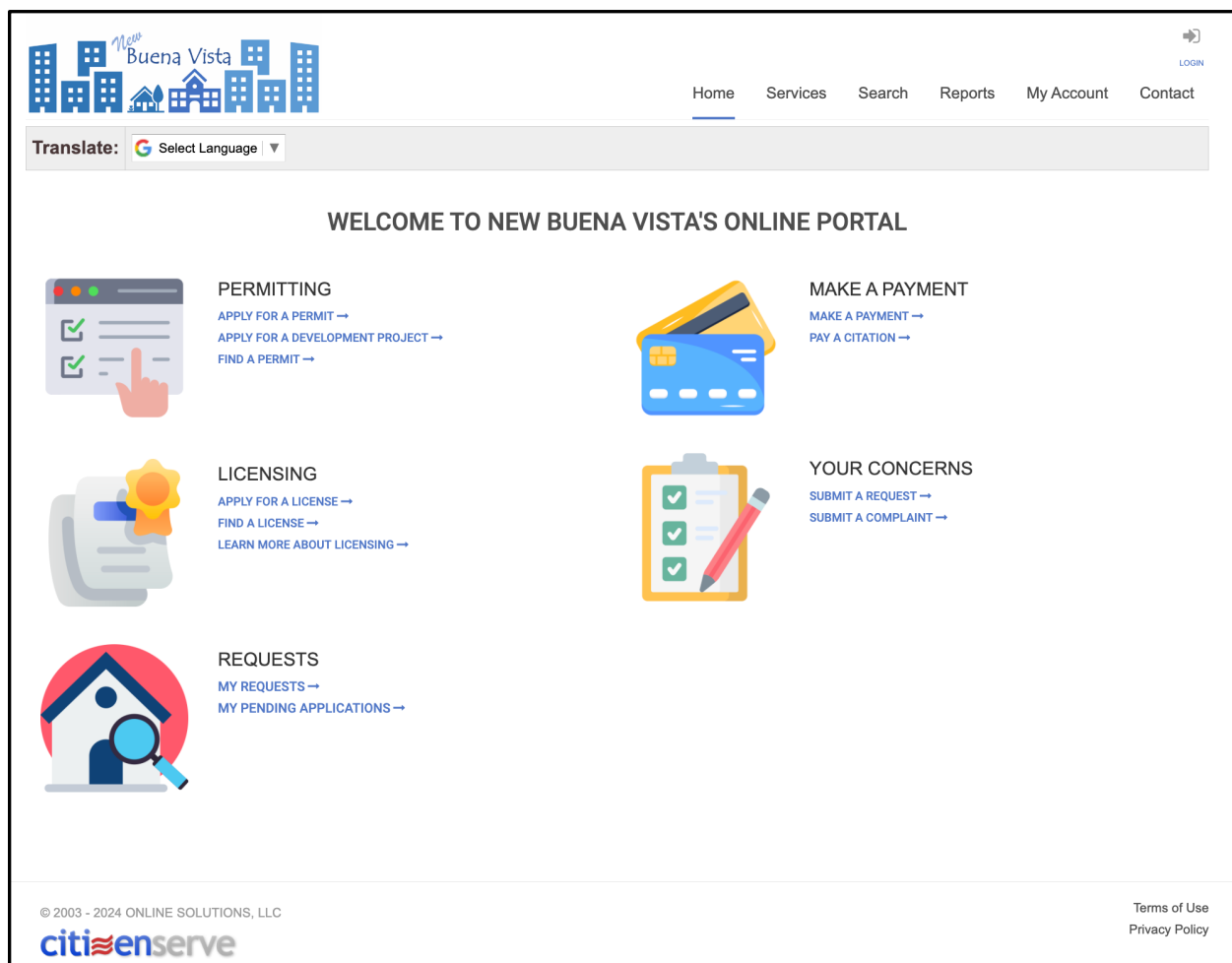
### **2.1 Permitting Module**

Citizenserve has a flexible permitting module that accommodates any type of permit, including building, land use, burn, and yard waste permits. Permits and their associated workflows can be quickly built. Citizenserve's permitting module increases customer satisfaction by reducing processing time, providing robust notification features to keep your constituents informed, and managing all records and data to enable quick access and comprehensive history.

#### **2.1.1 Online Portal**

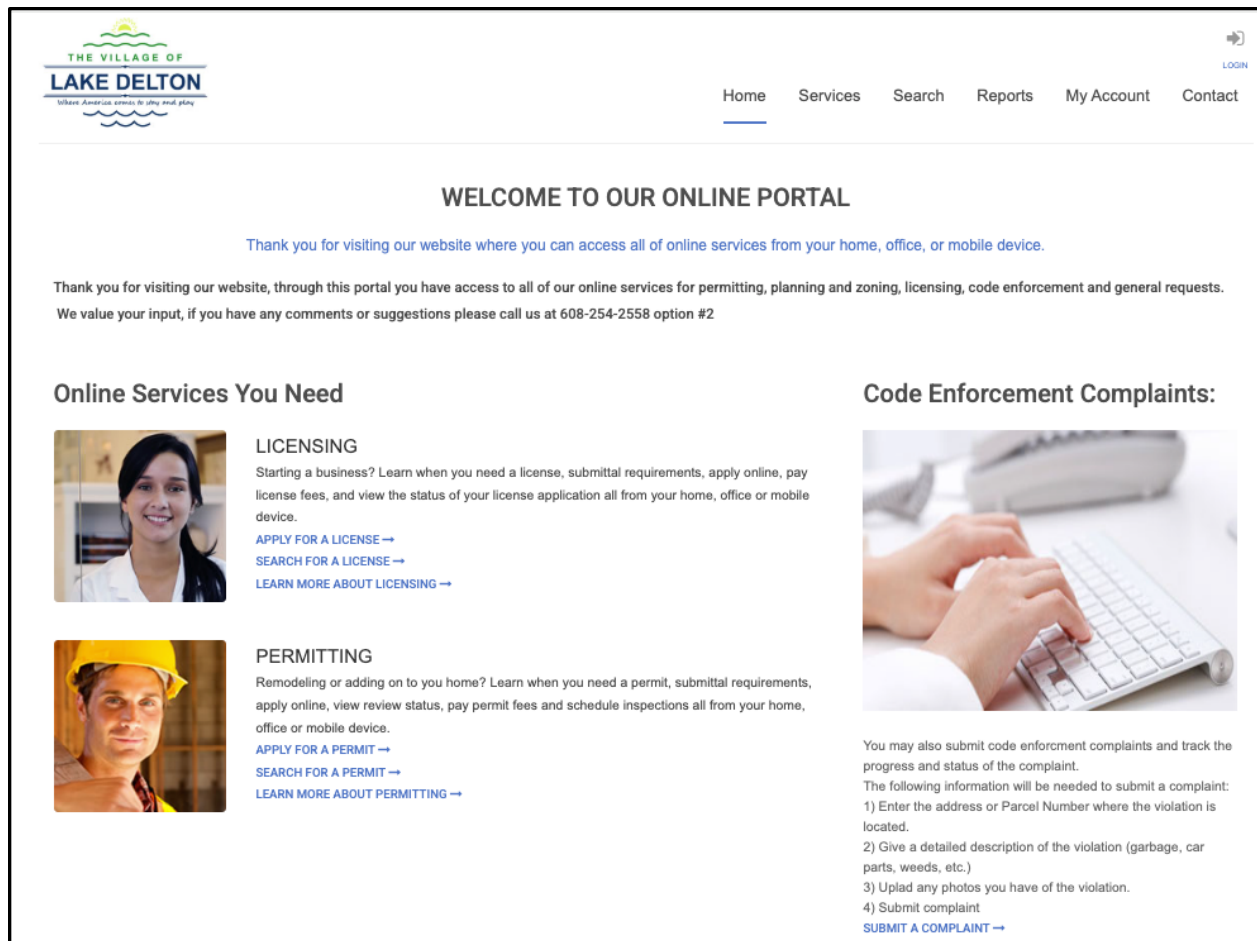
Citizenserve provides a configurable, customizable, PCI-compliant online portal that allows contractors, citizens, and business owners to participate electronically in the processes of permitting, planning & zoning, code enforcement, licensing, inspections, and requests. The portal is available 24/7/365 and can be configured as a link off the Town's website. The portal has been built into the solution from the beginning, so users are provided with a cohesive interface.

The image below shows the configuration of the portal for the fictitious Town of New Buena Vista. Visitors can learn about and apply for permits and licenses; submit code complaints or requests for services; make a payment; and easily access information on all their requests, such as permit applications. We can easily tailor the Town's portal to only show the Town's relevant information and services. Contractors, engineers, architects, and property owners can apply for a permit using a digital signature, upload digital building and site plans and other required documents, schedule an inspection, securely pay application fees, search permits and licenses, check on the status of an application, and provide resubmittals and additional documentation.



*Sample Configuration of the Citizenserve Portal*

The below image shows the configuration of the portal for the Village of Lake Delton, Wisconsin. Users can learn about, apply for, and renew business licenses; learn about, apply for, and check on the status of a variety of permits; search for licenses and permits; and submit code complaints.



### Example Citizenserve Portal – Lake Delton, Wisconsin

There is enormous flexibility in configuring applications to meet an individual municipality's needs. We will work with the Town during implementation to determine the requirements for each of the Town's permit types; we can replicate existing applications or make improvements and changes as desired. Applications can be configured to include the required fields, all explanatory and warning text, Town-specific graphics and logos, all contacts related to an application (contractor, architect, property owner, etc.), and any other data or information required. Applications can also be configured to indicate the required documents that must be uploaded and whether a digital signature is required. Specifying required fields and documents eliminates incomplete applications, saving time for both your staff and applicants.

Subcontractors can tie their permit applications back to the primary permit. Applicants can be prompted to indicate if the permit ties to an existing permit, and permits that have been linked are displayed under the master permit for easy processing by staff.

All citizenserve forms can include dynamic fields, which means the application will adapt depending upon the answers provided by the applicant. Conditions can be configured for

permit applications that prevent the submittal of an application from the online portal when the condition is triggered; for example, if the contractor has an expired license. Applicants can save in-process applications for completion later.

### **2.1.2 Fee Management**

**Fees.** Citizenserve enables flexibility in the setup of fees, and each permit, project, and license (application) type can have different fee calculations and can be tied to different account codes. All fee schedules can be end dated to inactivate fees and ensure that the correct fees are applied. Citizenserve can accommodate two fee types: manual and automatic fees. Manual fees are assigned by staff with proper security during the workflow. Automatic fees can be set up for ranges or specific values of application fields and can calculate fixed fees or variable fees against application data. Common fee types include application fees, plan review fees, impact fees, and state or county required fees.

Citizenserve will set up the Town's fees and map them to the Town's account codes during implementation, and maintenance of the Town's fees (changes to current fees and the addition of new fees) is included as part of the subscription's unlimited support. Citizenserve enables fees to be calculated for applications and paid from the counter or, with integration to a payment processor, securely paid from the portal. The Town determines when fees are displayed on the portal to the applicant; for example, some municipalities do not require fee payment until the plan review process is complete and the application is approved.

FEE STRUCTURE EFFECTIVE

Start Date

08/12/2022

End Date

1 to 20 of 21

ORDER	DESCRIPTION	ACCOUNT CODE	FEE GROUP	AUTO FEE	BASE ON	APPLY TO	RANGE	FEE	ON	
10	Building Permit Fee	GL-1896		On Custom Field	Valuation	Range	Begin 1.0000 End 3,999.0000	Base 114.0000000000 Secondary 0.0000000000	1.00 0.00	PlanCheck Copy Delete
11	Building Permit Fee	GL-1896		On Custom Field	Valuation	Range	Begin 4,000.0000 End 49,999.0000	Base 2,500.0000000000 Secondary 16.1000000000	4.00 1.00	PlanCheck Copy Delete
12	Building Permit Fee	GL-1896		On Custom Field	Valuation	Range	Begin 50,000.0000 End 499,999.0000	Base 5,500.0000000000 Secondary 8.1000000000	50,0 1,00	PlanCheck Copy Delete
13	Building Permit Fee	GL-1897		On Custom Field	Valuation	Range	Begin 500,000.0000 End 9,999,999,999.0000	Base 25,000.0000000000 Secondary 4.0000000000	500, 1,00	PlanCheck Copy Delete
20	Building Permit Fee	GL-1897		On Custom Field	Custom Field	Range	Begin 1.0000 End 3,999.0000	Base 114.0000000000 Secondary 0.0000000000	1.00 0.00	PlanCheck Copy Delete
21	Building Permit Fee	GL-1897		On Custom Field	Custom Field	Range	Begin 4,000.0000 End 49,999.0000	Base 2,500.0000000000 Secondary 16.1000000000	4.00 1,00	PlanCheck Copy Delete
22	Building Permit Fee	GL-1897		On Custom Field	Custom Field	Range	Begin 50,000.0000 End 499,999.0000	Base 5,500.0000000000 Secondary 8.1000000000	50,0 1,00	PlanCheck Copy Delete
23	Building Permit Fee	GL-1897		On Custom Field	Custom Field	Range	Begin 500,000.0000 End 999,999,999.0000	Base 25,000.0000000000 Secondary 4.0000000000	500, 1,00	PlanCheck Copy Delete
25	Swimming Pool Fee	GL-1900		Always	Custom Field	Full Amount	Begin End	Base 200.0000000000 Secondary		PlanCheck Copy Delete
100	Residential New Construction	GL-2002		On SubType	Custom Field	Range	Begin 0.0000 End 1,000.0000	Base 10.0000000000 Secondary 1.0000000000	0.00 1.00	PlanCheck Copy Delete
101	Residential New Construction	GL-2002		On SubType	Custom Field	Range	Begin 1,001.0000 End 999,999.0000	Base 60.0000000000 Secondary 0.1000000000	0.00 1.00	PlanCheck Copy Delete
104	Reinspection		Inspection Fee	Never	None	Full Amount	Begin End	Base 50.0000000000 Secondary		PlanCheck Copy

## Fee Setup Screen

Fees can also be added to activities. If the activity has a fee structure defined, the activity will display fee, payment, and refund information. The example below shows a fee that was assessed when a review was completed; the fee has not yet been paid.



✓

✓

•

≡

REVIEW INFORMATION

Department

Building

Activity Type

Review Complete

Assign To

Morgan Katz

Permit #:

B21-000060 New SFH - Foley

Created On

12/07/2021 by Liam Jameson

Notes

📅

DATES

Start Date

12/07/2021

Due Date

12/07/2021

Completion Date

Status

Pending

Hours

0.0

Billed To

Sam Smith

☰ REVIEW COMMENTS

#

STATUS

COMMENTS

FEES

FEE	DESCRIPTION	TOTAL	
Plan Review Administrative Fee		25.00	
Total Fees		25.00	

PAYMENTS

DATE	RECEIVED FROM	AMOUNT	
	Amount Paid	0.00	
	Balance Due	25.00	
	Invoice #	6	

Fees can also be added to inspection activities. The below screen shows a fee that has been assessed for a reinspection.

INSPECTION INFORMATION	
Department Building	▼
Inspection Type Reinspection	▼
Assign To Liam Jameson	▼
Permit #: B21-000060 New SFH - Foley	▼ ...
Created On 12/07/2021 by Liam Jameson	
Notes	//

DATES
Start Date 12/07/2021
Due Date 12/07/2021
Completion Date
Status Scheduled ▼
Hours 0.0
Billed To Sam Smith ▼ ...

☰ INSPECTION COMMENTS

≡ □ 📄

#	STATUS	COMMENTS

▮ FEES

🔢

FEE	DESCRIPTION	TOTAL
Reinspection Fee		35.00
Total Fees		35.00

💳 PAYMENTS

🏠

DATE	RECEIVED FROM	AMOUNT
	Amount Paid	0.00
	Balance Due	35.00
	Invoice #	7

*Inspection Activity Fee*

**Payments.** We have included PCI-compliant integration to a payment processor in our bid to enable the payment of fees from the portal with a credit card and, depending on the payment processor selected, payment by debit cards and ACH. The system will reflect that a fee was paid, amount and type of payment, and date/time of payment. Payments can be applied across fees and the

History will show when the fee(s) were paid. Staff can view permit fees and payments that have been applied for a permit on the Permit Screen. Permit fees can be configured to lock once they are paid.

FEES						
FEE	DESCRIPTION	QUANTITY	AMOUNT	TOTAL		
Building Permit Fee				8,958.70		
Residential New Construction				505.00		
Plan Review Fee				5,678.22		
Convenience Fee		1.0	133.9400	133.94		
Credit - GL2001	REFUND - for 1 tree	20.0	1.0000	-20.00		
Tree Fee	4 Conifers	4.0	20.0000	80.00		
				Plan Check Fees	5,678.22	
				Permit Fees	9,657.64	
				Total Fees	15,335.86	

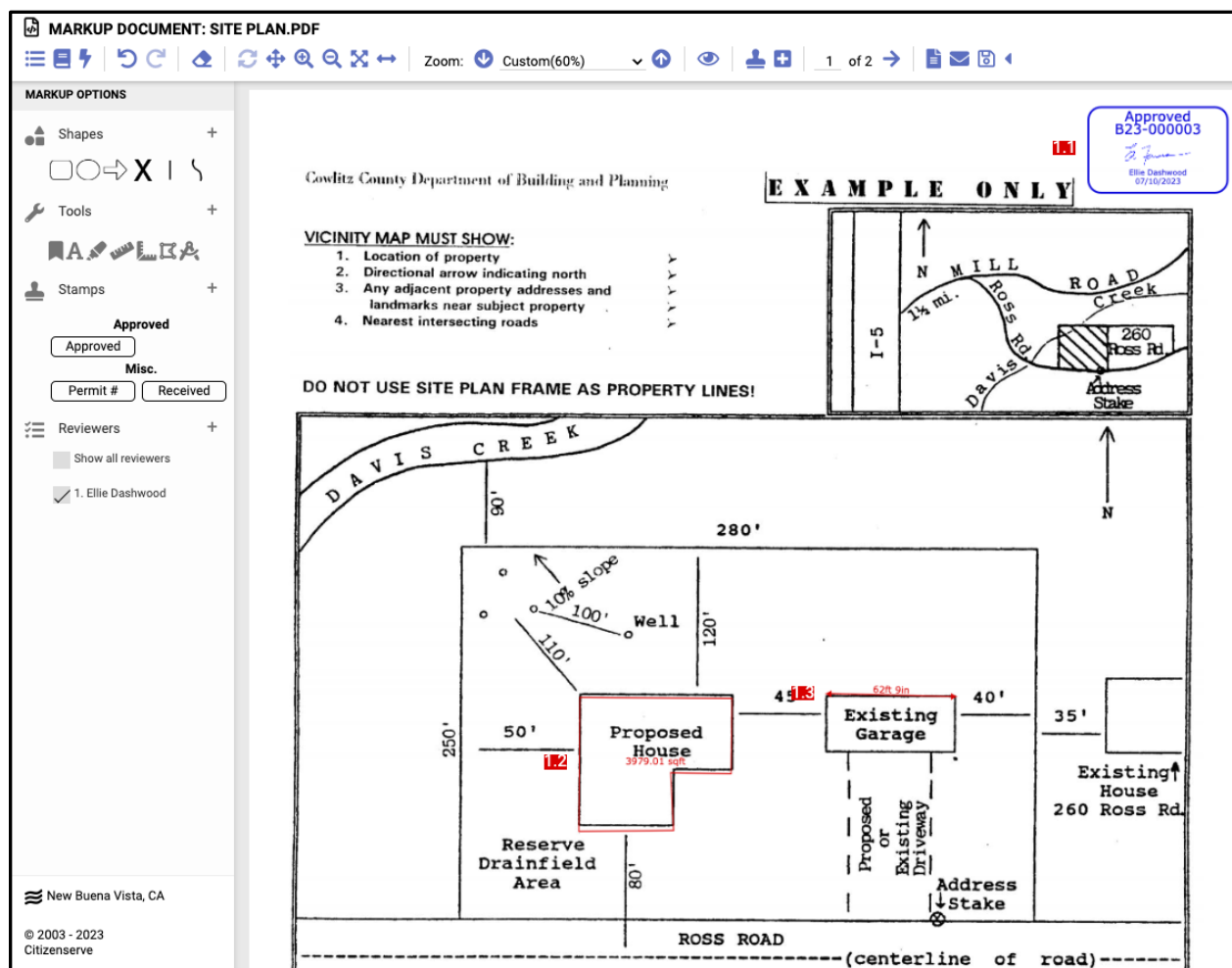
PAYMENTS						
DATE	TYPE	REFERENCE	NOTE	RECEIPT #	RECEIVED FROM	AMOUNT
01/16/2024	Credit	999999	B24-000010	388	Stella Martin Construction - Stella Martin	4,464.72
01/16/2024	Credit	999999	Convenience Fee for B24-000010	389	Stella Martin Construction - Stella Martin	133.94
01/16/2024	Check	1234		390	Sam Smith Construction - Sam Smith	10,737.20
						Amount Paid
						15,335.86
						Balance Due
						0.00

## Fees and Payments Screen

### 2.1.3 Plan Review and Tracking

You can create customized workflows that mimic your plan review process and digitally and visually track plan review status and comments. Workflow status can be tracked internally by Town staff, with real-time updates, while the applicant can check on the real-time status of a permit and any associated plan reviews by signing in to the portal. Plan review comments from reviewers are available from the portal, and notifications let your applicants know when a new set of comments and markups are available.

While the Town indicated in response to a question that you do not currently have a need for an electronic plan review solution, citizenserve provides an integrated, proprietary markup tool with every subscription and can train the Town's users at any time on its functionality. The citizenserve markup tool enables users to measure areas and linear distances and accurately scale drawings. The tool supports electronic plan review comments by enabling each user to enter individual notes, highlights, measurements, stamps, and other annotations; the markup shows who made the entry and can filter entries to show layers with all, some, or only a single user's markups.



*Measure Areas and Linear Distances with Citizenserve's Review Tools*

SELECT COMMENTS

Filter by Comment Group

SELECT	STATUS	COMMENT
<input type="checkbox"/>	✓	All wood installed in a structure of noncombustible construction shall be approved fire-retardant treated wood. 2009 IBC Sections 603.1 & 2303.2 //
<input type="checkbox"/>	✓	Fire-resistive through protection of plumbing, mechanical and electrical penetrations are required. 2009 IBC Section 713 //
<input type="checkbox"/>	✓	Fireblocking shall be installed to cut off concealed draft openings (both vertical and horizontal) and shall form an effective barrier between floors, between a top story and a roof or attic space. Fireblocking shall be installed in the locations specified in Sections 717.2.2 through 717.2.7. 2009 IBC Section 717.2 //
<input type="checkbox"/>	✓	The existing structure shall have smoke detectors outside each bedroom area, within each bedroom and on every level of the structure. The smoke detectors are permitted to be 9-volt battery type in areas outside of the construction area. 2009 IBC Section 907.2.10.1.2 //
<input type="checkbox"/>	✓	Every room or space that is an assembly occupancy shall have the occupant load of the room or space posted in a conspicuous place, near the main exit or exit access doorway from the room or space. Posted signs will be provided at the time of final inspection by this office and shall be maintained by the owner or authorized agent. 2009 IBC Section 1004.3 //
<input type="checkbox"/>	✓	Doors with a 32" clear opening width between the stop, measured with the doors open 90°, are required. 2009 IBC Section 1008.1.1 //
<input type="checkbox"/>	✓	A tactile sign stating EXIT and complying with ICC A117.1 shall be provided adjacent to each door to an area of refuge, an exterior area for assisted rescue, an exit stairway, an exit ramp, an exit passageway and the exit discharge. 2009 IBC Section 1011.3 //
<input type="checkbox"/>	✓	A flat continuous exit discharge pathway is required at an exit passageway to a public way. Grass and soil are not approved pathways. 2009 IBC Section 1023.5 //
<input type="checkbox"/>	✓	The floor of the restroom is required to be waterproof, non-absorbent, smooth and readily cleanable to 6" up the wall and the walls around the W.C. and urinal to 4' above the floor is required to be waterproof, non-absorbent, smooth and readily cleanable to 2' on each side. 2009 IBC Section 1210 //
<input type="checkbox"/>	✓	An ice dam membrane on the roof to 24", measured horizontally, inside of the exterior wall is required. 2009 IBC Section 1507.2.8.2 //
<input type="checkbox"/>	✓	Protect the building wall openings from vehicular damage at the overhead doors. 2009 IBC Section 1607.7.3 //

Select All

Add Comment

Save

Save & Add As Text

### Custom Lists of Electronic Plan Comments, Tied to Applicable Codes

The above figure shows one example of a partial Common Comments Book that has been configured for a building department and tied to specific codes; this tool is an enormous time saver for your plan reviewers. We will populate the tool with the Town's frequently used comments; plan reviewers can quickly select the applicable comments and codes when reviewing building and other plans. Plan review comments and associated codes are automatically generated and available to applicants from the portal. The below figure shows one example of comment groups that further simplify plan review comment entry.

SELECT COMMENTS

SELECT

Application Intake

Basement

Bathroom

Carport

Commercial Construction

Deck

Demolition

Fence and Pools

IBC-International Building Code (2009)

IMC-International Mechanical Code (2009)

IPC-International Plumbing Code (2009)

IRC-International Residential Code (2009)

Irrigation System

Kitchen Remodel

Landscape

License Application Review

NEC-National Electrical Code (2008)

Residential Construction

Shed

Vacation Rental License Review

non-absorbent, smooth and readily cleanable to 2' on each side. 2009 IBC Section 1210

✓ An ice dam membrane on the roof to 24", measured horizontally, inside of the exterior wall is required. 2009 IBC Section 1507.2.8.2

✓ Protect the building wall openings from vehicular damage at the overhead doors. 2009 IBC Section 1607.7.3

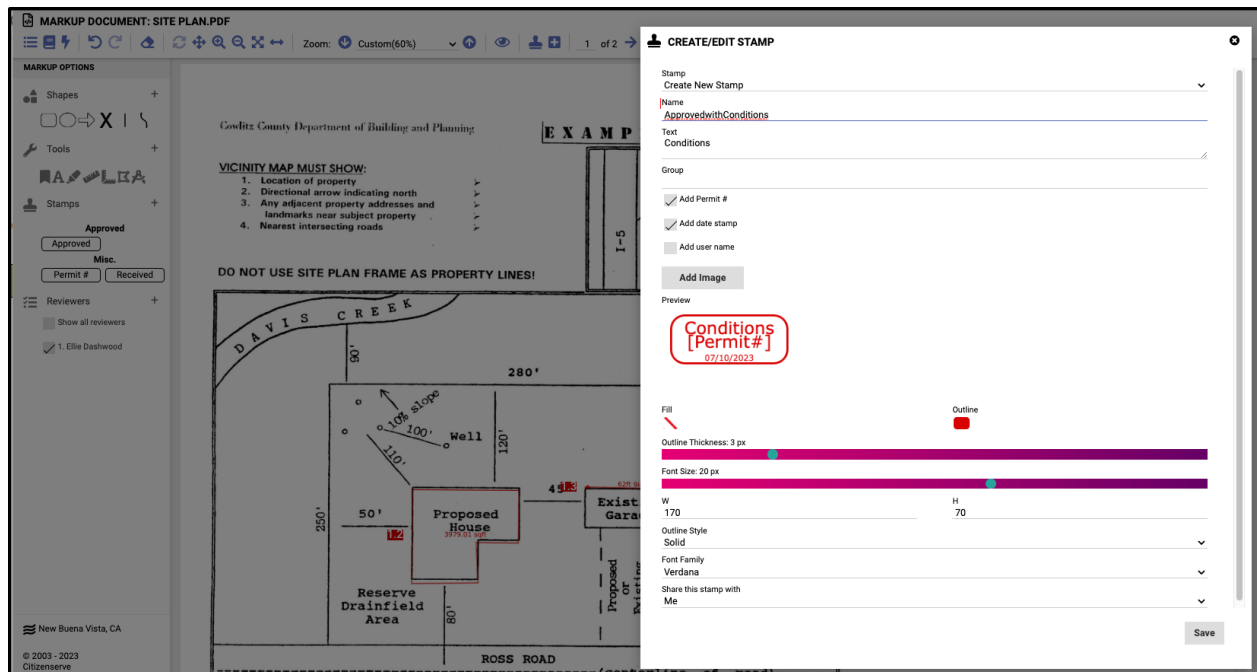
Select All

Add Comment

Save

Save & Add As Text

### Create Comment Groups for Easy Selection of Applicable Comments

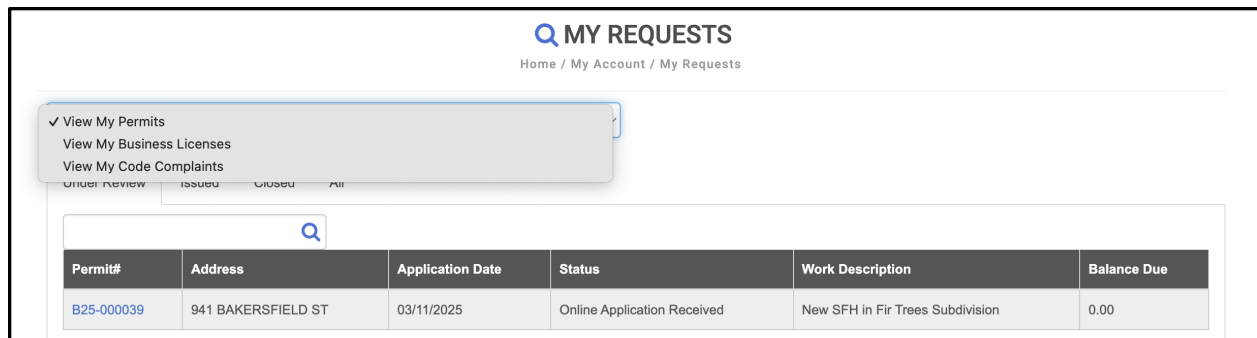


*Easily Create and Share Custom Stamps*

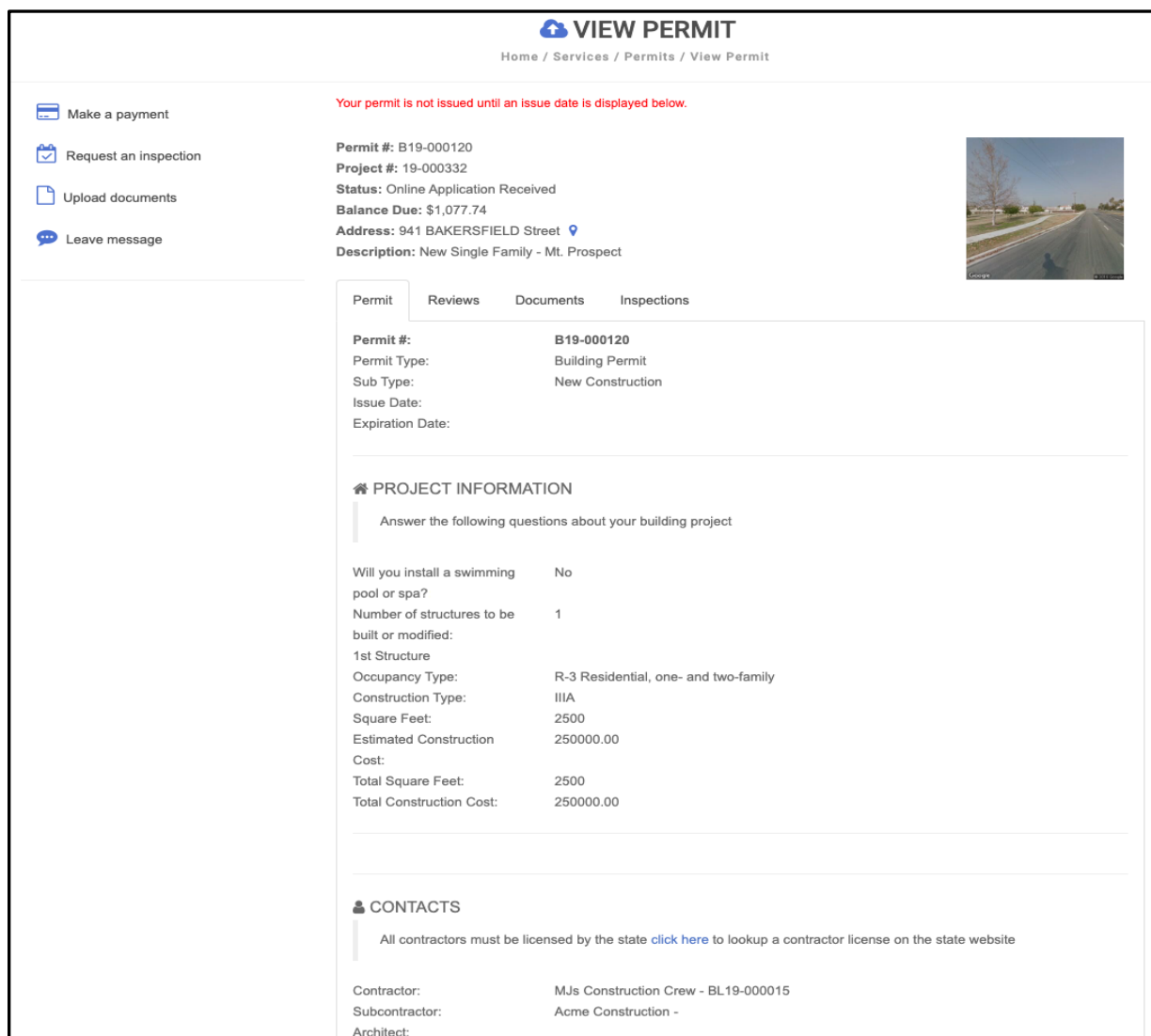
## 2.1.4 Applicant Communication and Status Monitoring

**Applicant Notifications.** There are a variety of ways staff can communicate with an applicant. The application workflow can be configured to send emails at designated points in a workflow; for example, a review activity can be completed and a template email automatically generated to be sent to the applicant and any other people involved in the project. Emails can be edited prior to sending, if desired, and all emails sent from citzenserve will appear as if they were sent from the Town's email system (the "From" information will show the associated Town email address) and will be stored as a document in the associated case file. Ad hoc emails can be written and sent anytime, with a copy of the email stored on the Documents tab.

**Applicant Status Monitoring.** Another means of communicating with applicants is through the portal. The portal can be configured so that customers who submit permit and license applications have access to the status of their applications. The below screen shot shows the options that have been configured in a drop-down to enable a customer from the My Requests screen to view all permit and business license applications and code complaints; currently the option for View My Permits is selected. Please note that the drop-down is fully customizable to meet your requirements.




*My Requests Screen Available to Customers from the Portal*



*Online Portal View Permit Screen (partial screenshot)*



The above screenshot shows a partial view (due to space constraints) of the View Permit screen that is accessible by a customer from the portal; the tabs for Permit, Review, Documents, and Inspections show the status information that is available to the applicant. It's easy for staff and customers to collaborate through the information, documents, and inspection requests on the online portal, or through staff emails and letters generated within citizenserve. Because the portal and citizenserve modules all use the same database, data entered and documents uploaded by staff are immediately available to the applicant on the portal, and applications, documents, and data entered by the applicant are immediately available to staff.


**VIEW PERMIT**


[Home](#) / [Services](#) / [Development Project](#) / [View Permit](#)

**Permit #:** RZ20-000009


**Project #:** 20-000361

**Status:** Online Application Received

**Balance Due:** \$0.00

**Address:** 890 TAFT ST 

**Description:** Rezone 3 lot subdivision



Permit
Reviews
Documents
Inspections

Task	Department	Start	Completion	Status
City Council Review	Planning & Zoning	12/19/20		Pending
Application Review	Conservation	11/19/20		Pending
Review Complete	Planning & Zoning			Pending
Planning Commission	Planning & Zoning	01/28/21	01/28/2021	Approved
Planning and Zoning Compliance Review	Planning & Zoning	11/19/20	11/19/2020	Complete
Application Review	Engineering	11/19/20	11/19/2020	Complete <a href="#">VIEW COMMENTS →</a>
Public Works Review	Public Works	11/19/20	11/19/2020	Approved <a href="#">VIEW COMMENTS →</a>
Application Review	Planning & Zoning	11/19/20	11/19/2020	Complete <a href="#">VIEW COMMENTS →</a>
Utility Review	Planning & Zoning	11/19/20	11/19/2020	Resubmittal Required <a href="#">VIEW COMMENTS →</a>

*Reviews Tab on the Portal*

It's also easy for an applicant to identify and access review comments. The above screen shows the Reviews tab that an applicant has accessed from the portal for a rezoning permit; the blue [VIEW COMMENTS](#) hyperlinks indicate there are comments from the Engineering Application Review, Public Works Review, and Planning & Zoning Application Review. Clicking on a hyperlink displays the comments.

The screenshot displays the 'DOCUMENT COMMENTS' section of a web portal. At the top, there is a navigation bar with links: Home / Services / Permits / View Permit / Documents / Document Comments. Below this is a 'Translate' section with a 'Select Language' dropdown. The permit details are listed: Permit #: B23-000035, Work description: New SFH, and Address: 991 BAKERSFIELD ST. A 'PAGE 1' dropdown is visible. On the left, a list of comments is shown, with the first comment from 'Ellie Dashwood' dated 10/26/2023. The main area features a 'Vicinity Map' and a 'Site Plan'. The vicinity map shows the property location relative to Davis Creek, Mill Road, and Ross Rd. The site plan shows the property boundaries, a well, and a fence line. A 'Received' stamp is visible on the vicinity map. The site plan includes dimensions and a note: 'DO NOT USE SITE PLAN FRAME AS PROPERTY LINES!'.

**DOCUMENT COMMENTS**

Home / Services / Permits / View Permit / Documents / Document Comments

Translate: [Select Language](#)

Permit #: B23-000035  
Work description: New SFH  
Address: 991 BAKERSFIELD ST

PAGE 1

**1.1 RECEIVED →**  
Building, Ellie Dashwood  
• Ellie reviewed on Tuesday am.

**1.2 ARROW →**  
Building, Ellie Dashwood

• Allowable Fence Materials: All fencing materials must be contiguous; any fencing that is installed on a piece of property must be of the same material and design as the existing fence. Acceptable materials for fencing and decorative posts include but are not limited to: brick, stone, and other masonry; synthetic materials; natural and treated woods; wrought iron; decorative aluminum, and chain link. o PVC and other synthetic materials used for both residential and commercial fencing applications shall meet the minimum quality standards set forth in the ordinance. o Chain link shall only be permitted residential and industrial zoning; it cannot be used in commercially zoned areas. - Prohibited materials for fencing and decorative posts include but are not limited to: barbed wire; razor wire; hardware cloth; wire mesh; and electrified fencing. - Barbed wire can be used on security fences in industrially zoned areas, provided the fence has a minimum height of 5 feet, 6 inches and the property owner has applied for and received a conditional use permit as outlined in Chapter 400 Article VII. Placement: - The maximum height for fencing, accompanying

**Received**  
10/26/2023  
Ellie Dashwood  
Building  
1.1

Cowlitz County Department of Building and Planning

**VICINITY MAP MUST SHOW:**

1. Location of property
2. Directional arrow indicating north
3. Any adjacent property addresses and landmarks near subject property
4. Nearest intersecting roads

**DO NOT USE SITE PLAN FRAME AS PROPERTY LINES!**

**EXAMPLE ONLY**

DAVIS CREEK

280'

120'

100'

110'

Well

1.2

DAVIS CREEK

1 1/4 mi.

ROSS RD

280 Ross Rd

Address Stake

N

The applicant clicks on the [VIEW COMMENTS](#) link to view the stamp, shapes, and comments added by review staff.

One critical feature in citizenserve is the ability to set User Notifications and Assignments for each permit, license, and case type so staff and departments are notified when citizens, contractors, businesses, and other customers take action on the portal. For example, if a staff member requests a revised building plan document, the notification matrix will let the staff member know when the document is uploaded. Without notices of actions taken on the portal, the staff would have to keep checking the file for the uploaded document.

**User Notifications and Assignments: Permitting Options**

Type	On New	On Modify	On Payment	On Inspection Request	On Leave Message	On Document Upload
Building Permit	Do Not Notify	Morgan Katz	Morgan Katz	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti
Electrical Permit	Do Not Notify	Do Not Notify	Do Not Notify	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti
Mechanical Permit	Do Not Notify	Do Not Notify	Do Not Notify	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti
Plumbing Permit	Do Not Notify	Do Not Notify	Do Not Notify	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti
testing & testing	Do Not Notify	Do Not Notify	Do Not Notify	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti
Pool Permit	Do Not Notify	Do Not Notify	Do Not Notify	Add to Unassigned Ar	Add to Unassigned Ar	Add to Unassigned Acti

Type	On New	On Modify	On Payment	On Inspection Request	On Leave Message	On Document Upload
Building Permit	Do Not Notify	Do Not Notify	Do Not Notify	Specific Email(s)	Do Not Notify	Do Not Notify
Electrical Permit	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
Mechanical Permit	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
Plumbing Permit	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
testing & testing	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
Pool Permit	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify

Save

Links to other permit configuration options:

- User notification and assignments
- Permit status options: status change notification and edit permit options
- Permit type options: allow new applications, submittal documents and address validation
- Application Email Notifications
- Licensing Options
- Development Project Options
- Code Enforcement Options


*Sample Citizenserve User Notifications and Assignments Configuration Screen (Permitting)*

## 2.1.5 Inspection Scheduling and Tracking

Citizenserve provides a single point of inspection scheduling and tracking. Customers can request inspections from the portal or via text. Customers can select the desired date and time range of the inspection. Automatic notifications of inspection requests can be configured.

Citizenserve has a built-in device and browser independent calendar feature that allows inspections and tasks to be easily assigned, scheduled, and managed. Inspectors can select a setting to email them a calendar invitation when an inspection is scheduled. The email contains

an ICS file that adds an appointment to the inspector's Outlook calendar. Citizenserve also includes options to allow text notifications to be sent to contractors when inspections are scheduled.

 **REQUEST AN INSPECTION**

Home / Services / Permits / View Permit / Request an inspection

**SKYPE inspections** can be scheduled for:

- HVAC systems
- Water Heaters

For instructions and request form, select the inspection type: **SkypeInspection**

**Self-inspection videos** now accepted for:

- Re-ROOFs
- Water Heaters

Inspection Type:

Desired Date:

Notes:

✓

Backflow Prevention

CO Inspection

CO Reinspection

Final Inspection

Footing

Foundation

Live Remote Inspection

Pier

Reinspection

Rough Electrical

Rough Plumbing

Temporary Occupancy


Vacation Rental Inspection

Video Inspection

Water Heater Inspection

inspection.

*Customers can request an inspection from the portal; the inspection types are customizable*



## REQUEST AN INSPECTION

Home / Services / Permits / View Permit / Request an inspection

**SKYPE inspections** can be scheduled for:

- HVAC systems
- Water Heaters

For instructions and request form, select the inspection type: **SkypeInspection**

**Self-inspection videos** now accepted for:

- Re-ROOFs
- Water Heaters

For instructions and submission form, select the inspection type: **VideoInspection.**

Inspection Type:

Desired Date:

Preferred Inspection Time Range:

sign here:

Notes:

Footing
 ▼

12/09/2021

✓

08:00 a.m. - 10:00 a.m.  
 10:00 a.m. - 12:00 p.m.  
 12:00 p.m. - 14:00 p.m.  
 14:00 p.m. - 16:00 p.m.  
 16:00 p.m. - 17:00 p.m.

*You can configure the inspection request form with inspection time ranges (optional)*

Citizenserve supports the creation of an unlimited number of inspection types, including building, code, and health inspections. Citizenserve easily manages annual inspections, such as annual fire or rental housing inspections. Each inspection type can be set up as a custom form or to-do list with template outputs such as an inspection report. Templates can be created as letters, emails, or any other combination of text and graphics. Individual checklists can be created for each different inspection type.

Citizenserve is device and browser independent, so your inspectors can access the full functionality of citizenserve from the field. Any information entered in the field is immediately available to staff in the office, and vice versa; no synching of data is required. As a fully mobile solution, inspectors are notified of inspections due and can look up property ownership information, fill out an inspection report, add violations, take and attach photos, mark up images, generate tickets or notices of violation, and schedule re-inspections – all in the field

from a laptop, iPad, or other mobile device. Your inspectors can write tickets for violations from the field using a mobile device, provide a signature, and print tickets using a Bluetooth printer. Photos can be taken and added directly from device cameras.

Your inspectors can select from multiple code sections, including building, fire, health, or environmental codes. As part of Citizenserve's unlimited support, we will ensure that your codes are kept current. Inspectors can also add inspection comments using speech-to-text from iPads and other devices that support this feature. Our offline mode enables inspectors to conduct inspections from the field in areas of no coverage.

### 2.1.6 Permit Document Issuance

An unlimited number of permit documents can be created, including Certificates of Occupancy, Certificates of Completion, etc. Inspectors can create documents from the field that are automatically attached to the case, including photos, notices of violation, certificates, or other documentation generated during an inspection. Any of the documents can be generated in the field and emailed using an iPad or other mobile device or printed with a Bluetooth printer.

**SEND LETTER: PERMIT CARD**

**New Buena Vista**

**BUILDING PERMIT**  
B23-000035

BUILDING DIVISION  
555.480.8484

**PROJECT INFORMATION**

**PROJECT DESCRIPTION:** New SFH  
**JOB SITE:** 991 BAKERSFIELD ST, NEW BUENA VISTA, CA 93488  
**PARCEL:** 005-011-027  
**PROPERTY OWNER:** RADCLIFF JEFFERY A  
**APPLICANT NAME:** Misha Franklin Franklin Construction  
**ISSUE DATE:** 03/29/2023  
**EXPIRATION DATE:** 09/29/2023

**REQUIRED INSPECTIONS**

Inspection Type	Date Approved	Inspector	Comment
Footing			
Foundation			
Backflow Prevention			
Rough Plumbing			
Rough Electrical			
Rough Mechanical			
Temporary Occupancy			
Final Inspection			

Print Edit Save

#### Example Permit Card

The Citizenserve implementation manager will work with the Town during implementation to build all documents that will be issued and identify points in the workflows where the documents are generated and the conditions for issuance. We will include the text, graphics,

and fields required by the Town; we can either replicate existing documents or can use the existing document as a starting point. Documents such as the permit card can be designated to be placed on the portal so the applicant can download, review, and print them.

## **2.2 Planning & Zoning Module**

Citizenserve planning & zoning software completely automates the processes associated with application, review, routing, inspections, resubmittals, and public notification. An unlimited number of application types can be created. Citizenserve's planning & zoning module shares very similar functionality to the permitting module. Applicants can submit applications that include multiple parcels and addresses, attach site plan documents, securely pay application fees, view the status of their applications, and provide resubmittals and associated documents through the online portal. Citizenserve tracks the date and time of each plan submission.

We will configure your planning & zoning applications to meet the requirements of the Town. Applications are automatically routed to the appropriate reviewers based on your unique workflow routes. Citizenserve's calendar functions are flexible; workflows can be configured to set different dates in the workflow according to algorithms, while users with the proper security can override these dates if needed. Citizenserve's user friendly calendars enable staff and supervisors to view individual or consolidated schedules to enable decision making and task prioritization and scheduling. You can track due dates for public notices and legal advertisements based on the hearing dates you select and can create templates for notification of meetings. A dynamic list of meeting dates can be posted on the portal for public access.


The screenshot displays the public portal interface for the City of Danville. At the top left is the City of Danville seal. The top right contains navigation links: Home, Services, My Account, and Contact. A shopping cart icon shows '1 ITEM' and a 'LOGOUT' link. The main heading is 'APPLY FOR A PROJECT' with a sub-breadcrumb 'Home / Services / Zoning / Apply for a development project'. The 'Project Type' dropdown menu is open, showing a list of application types. A red vertical bar next to the label 'Project Type:' indicates a required field. A tooltip above the dropdown states 'Indicates a required field'.

Project Type
Home Occupation Application
Planning Unit Development Application
Rezoning Petition
Special Use Permit
Variance
Zoning Appeal Application
Zoning Ordinance Amendment

### *Public Portal for a Citizenserve Customer – Zoning Application Types*

The below images show the workflows associated with a plat application for a Citizenserve customer (identifying details have been obscured). We will configure the Town's workflows for each application type to match your business processes.





**PERMIT PROJECT**  
 FILE #: 23-020645  
 THIS ADDRESS HAS AN OPEN FILE WITH AN EXPIRED PERMIT ON IT.  
 PZ-02-23: PLAT OF CONSOLIDATION (ADMINISTRATIVE) 321 W PROSPECT AVE

[PERMITS](#)
[REVIEWS](#)
[INSPECTIONS](#)
[DOCUMENTS](#)
[VIOLATIONS](#)
[CONTACTS](#)
[ACTIVITIES](#)
[NOTES](#)
[FILE](#)
[FEES](#)

ROUTE NAME	PERMIT #	STATUS
PLAT APPLICATION PERMIT	PZP23-000017	UNDER REVIEW

Please refer to revised documents under "2nd submittal 2023.0227"

ACTIVITY TYPE	DEPARTMENT	ASSIGNED TO	STATUS	DUE	COMPLETED
<a href="#">Initial Review</a>	Planning & Zoning Division		Completed	03/07/2023	03/06/2023
<a href="#">Plan Review</a>	Planning & Zoning Division		Approved	03/13/2023	03/10/2023
<a href="#">Plan Review</a>	Public Works Department		Approved	03/13/2023	03/07/2023
	• No further PW issues.				
<a href="#">Plan Review</a>	Planning & Zoning Division		Approved	03/13/2023	03/10/2023
	• <b>Comment:</b> No further comments for planning and zoning.				
<a href="#">Final Review</a>	Planning & Zoning Division		Approved	03/12/2023	03/10/2023
	• <b>Comment:</b> Refer to "PZ-02-23 321 W Prospect Ave (Administrative Plat of Consolidation) Review Letter #2 03.10.2023.pdf" under Documents tab.				

Workflow for a Citizenserve Customer's Plat Application, Top of Workflow (identifying details obscured)

PLAT APPLICATION PERMIT	PZP23-000017	UNDER REVIEW			
<a href="#">ACTIVITY TYPE</a>	<a href="#">DEPARTMENT</a>	<a href="#">ASSIGNED TO</a>	<a href="#">STATUS</a>	<a href="#">DUE</a>	<a href="#">COMPLETED</a>
<a href="#">Initial Review</a>	Planning & Zoning Division		Completed	02/01/2023	01/31/2023
	• <b>Comment:</b> Waiting for application fee payment of \$250.				
<a href="#">Plan Review</a>	Planning & Zoning Division		Completed	02/07/2023	02/03/2023
	• <b>Comment:</b> See Planning Review Comments dated 2/3/23 in the documents tab.				
<a href="#">Plan Review</a>	Public Works Department		Not Approved at This Time	02/07/2023	02/01/2023
	• <b>Required:</b> The proposed consolidation combines 3 lots into 1; label the new lot as "Lot 1". (Lot 34 implies at least 33 other lots in BAC Investment Properties Consolidation.) • <b>Required:</b> Correct the alley width to 16'. • <b>Comment:</b> If this consolidation is to be handled administratively, delete the "President and Board of Trustees" certificate, and add a certificate for the Community Development Director. • <b>Comment:</b> Note: Drainage & utility access is from both the front and back of the property. No additional easements are required.				
<a href="#">Plan Review</a>	Planning & Zoning Division		Completed	02/07/2023	02/10/2023
	• <b>Comment:</b> Refer to "PZ-02-23 321 W Prospect Ave (Administrative Plat of Consolidation) Review Letter #1 02.10.2023.pdf" under the Documents tab.				
<a href="#">Final Review</a>	Planning & Zoning Division		Not Approved at This Time	02/12/2023	02/10/2023
	• <b>Comment:</b> Please refer to "PZ-02-23 321 W Prospect Ave (Administrative Plat of Consolidation) Review Letter #1 02.10.2023.pdf" under the Documents tab.				

Workflow for a Citizenserve Customer's Plat Application, Bottom of Workflow (identifying details obscured)

Plan reviewers have access to searchable electronic reference materials including building code handbooks, GIS layers, and property history. Citizenserve's review notifications work the same for the permitting and planning & zoning modules; applicants are notified when reviews are completed and review comments are available and can access each reviewer's comments from the portal. Notification emails can also be configured to include comments, if desired.

You can post any report on the portal to share information with the public. We will work with the Town to determine any planning and zoning reports to be placed on the portal, the fields/information they contain, and any relevant search conditions. Portal reports enable the public to obtain the information they need without staff assistance, such as project lists and related information and meeting schedules.

### **2.3     Licensing Module**

Citizenserve licensing software automates the application, payment, review, and renewal of business, dog, contractor, and other licenses. Applicants can submit applications, upload copies of required documents, check on the status of applications, securely pay application fees, and download and print their licenses through the citizenserve online portal.

## VIEW LICENSE

Home / Services / Licensing / View License

License #: AL25-000079

Status: Online Application Received

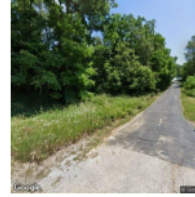
Issue Date:

Expiration Date:

Balance Due: \$0.00

Name: Benji

Address: 601 UNION ST



License   Reviews   Documents   Inspections

License #: AL25-000079

License Type: Animal License

Sub Type: Dog License

### ☆ DOG INFORMATION

Application Type: New Application

Breed: Yorkshire Terrier

Sex: Male

Color: Black, Brown, White

Markings:

Rabies Tag/Certificate Number: 255017

Date Vaccinated: 08/06/2024

Date Expired:

Veterinary Clinic:

Micro Chip Number:

Dog Birthday: 03/04/2023

Please check this box if the

licensed pet is deceased

(this will prevent future

license renewal

notifications):

No

notifications):

### 📎 SUBMITTAL DOCUMENTS

Rabies Vaccination Record: IMG\_7879.jpeg

Proof of Spay / Neuter: Image\_250204\_191347.jpeg

### \$ LICENSE FEE

License For: Spayed / Neutered

License Type: 1 year

**A (1) one year dog license requires your dogs rabies vaccination is valid for at least (30) thirty days from date of purchase.**

Make Check Payable to Pottawattamie County Treasurer

Applicant Signature: signature.png

Any and all information

given to County

Government may be

considered an open record

and subject to request from

anyone at anytime. Please

check this box if you want

your contact information to

be made public, or leave it

un-checked if you are giving


this information only as a

convenience in the matter.:

*Dog license application record from a Citizenserve customer's portal (license not yet issued)*

Citizenserve's notifications feature enables you to configure notifications for your staff when license applications are submitted online. You can create customizable deficiency checklists based on application types and quickly generate and email Deficiency Notices. Upon final approval, you can generate License Certificates that can be mailed, emailed, or downloaded from the online portal.

The below examples show the Review steps in a workflow that has been set up for a business license. The application has Zoning Site Plan Review, Completeness Check, and Schedule Inspection activities. The ASSIGNED TO column shows the assignment of tasks to individual staff members, as defined in the workflow.



**LICENSE PROJECT**  
 FILE #: 25-001146  
 1994 WARRENSVILLE CENTER RD B SOUTH EUCLID OH 44121  
 TECH FIX & LIFESTYLE

[LICENSES](#)
[REVIEWS](#)
[INSPECTIONS](#)
[DOCUMENTS](#)
[VIOLATIONS](#)
[CONTACTS](#)
[ACTIVITIES](#)
[NOTES](#)
[FILE](#)

ROUTE NAME	LICENSE #	STATUS				
BUSINESS LICENSE REVIEW	BL25-000022	UNDER REVIEW				

ACTIVITY TYPE	DEPARTMENT	ASSIGNED TO	STATUS	DUE	COMPLETED
Zoning Site Plan Review	Building Department	Nicholas Cobourn			
Completeness Check	Building Department	Rebecca Sopko		04/23/2025	
Schedule Inspection	Building Department	Rebecca Sopko			

### Staff View of a Business License Workflow Route Display with Details (real-time status)

When it comes time for renewal, you can create batch email or mail renewal notices quickly. Custom renewal processes can be created, and renewal letters can direct business owners to the online portal for renewal and payment. 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 renewals.

## 2.4 Code Enforcement Module


Citizenserve code enforcement software completely automates the process of routing complaints, opening cases, scheduling inspections, recording violations, generating case forms, and coordinating resolutions. Citizens can enter complaints and check on the status from the online portal; you can also configure the portal to allow anonymous complaints. We will work with the Town to configure business rules in citizenserve to automatically route complaints to the appropriate department for quick action.

Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case. Citizenserve's robust case management capabilities enable code enforcement cases to be created with multiple violations, and each violation can be tracked and resolved separately. We can build violation types to reflect local codes, and maintenance of violation types and codes is included in our unlimited support. You can add violations to a file and filter by section to list only the applicable violations. The code enforcement module is part of citizenserve's integrated solution, so code violations are visible in other modules such as the permitting and licensing modules.


Advantages of the Citizenserve code enforcement module for the Town include an efficient approach to responding to code complaints and the organization of complaints, inspections, violations, actions taken, and associated documents such as photos. The creation of historical records will enable the Town to identify properties that pose chronic code violation issues.


The screenshot shows the 'SUBMIT A COMPLAINT' page on the Citizenserve portal. The header includes the 'Buena Vista' logo and navigation links: Home, Services, Search, Reports, My Account, and Contact. A 'LOGOUT' link is also present. Below the header, the page title 'SUBMIT A COMPLAINT' is displayed, followed by the breadcrumb 'Home / Services / Code Concerns / Submit a complaint'. A 'Translate' section with a 'Select Language' dropdown is visible. The main form area contains labels for 'Describe your complaint:', 'Type:', and 'Address or Parcel #:'. The 'Describe your complaint:' field is highlighted with a red border and contains the text 'Abandoned vehicle'. The 'Type:' dropdown menu is set to 'Code Enforcement'. The 'Address or Parcel #' section includes input fields for 'pismo beach', 'CA', and '93312', with a 'FIND ADDRESS' button below them. A red vertical line on the left side of the form indicates required fields. A small blue question mark icon is located next to the address input fields.

*Public portal users can submit complaints from the portal*





[Home](#)
[Services](#)
[Search](#)
[Reports](#)
[My Account](#)
[Contact](#)






**VIEW COMPLAINT**


[Home](#) / [Services](#) / [Code Concerns](#) / [View Complaint](#)

 Upload documents

 Leave message

**Translate:**  Select Language ▼

**File #:** 24-000118  
**Status:** Open  
**Open Date:** 04/11/2024  
**Close Date:**  
**Type:** Code Enforcement  
**Address:** 960 STRATFORD ST   
**Description:** Junk left on neighbors lawn, and junk vehicle parked on curb for 2 weeks



[Complaint](#)
[Activities](#)
[Documents](#)
[Violations](#)

Type	Department	Date	Status	
Citation	Code Enforcement	04/11/2024	Follow Up Required	
Re-Inspection	Code Enforcement	04/11/2024	Follow Up Required	
Inspection	Code Enforcement	04/11/2024	Follow Up Required	

*Complainants can access the status of the code case from the portal*

An unlimited number of people, businesses, and other contact types can be associated with a case, and each person or entity can have a different association with the case. An unlimited number of notice or letter forms can be created; each can be completely customized and can initiate database processes such as fee assessment or file status changes. Code cases can be prioritized and escalated. Code enforcement case processes can take a case from courtesy notice, violation, citation, abatement, to court, fine, lien, payment, and resolution.

Code inspections can be scheduled automatically according to complaint type or can be assigned manually. Code cases could be assigned to inspectors based upon geographic attributes provided through integration to the Outagamie County GIS. As a fully mobile solution, code enforcement inspectors are notified of inspections due and can look up property ownership information; enter their findings from an inspection; add violations; add freeform notes; take and attach photos; generate tickets, notices of violation, or warnings; close violations after verifying the required fix; and schedule re-inspections – all in the field from a tablet or laptop. Enforcement documents and forms can be generated in the field using an iPad or other mobile device and Bluetooth printer.

**CODE CASE**  
FILE #: 23-000145

No image found for this file, click here to upload an image.

**UN-PERMITTED DRIVEWAY EXPANSION**

FILE CONTACTS ACTIVITIES DOCUMENTS VIOLATIONS NOTES

**FILE INFORMATION**

Complaint Description  
Un-permitted Driveway Expansion

Status  
Open

Open Date  
06/22/2023

Close Date

Disposition

Department  
Permitting

Responsible User

Priority

**PROPERTY INFORMATION**

Property Address  
ST

St Albans City VT 05478

Parcel #  
22 41

Owner Name

Owner Address

ST. ALBANS VT 05478

Owner Phone

Legal Description

Approximate Location

*Example Code Case (identifying details obscured)*

## 2.5 Request Tracking Module

Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests. Citizens can submit requests on the Town's website through the citizenserve online portal. With configurable automatic routing based on request type, appropriate staff are notified and can respond to a citizen's request immediately. Town staff can communicate with your citizens effectively and efficiently using citizenserve's automatic notifications, automated letters, and email templates.

**SUBMIT A REQUEST**

Home / Services / Request Tracking / Submit a request

indicates a required field

Please enter the general topic of your request:

Type:

Records Request

- Bulky Waste Pickup
- Pot Hole
- Public information request not related to a specific address
- Public information request related to a specific address
- Request not related to a specific address
- Requests related to a specific address or location
- Submit Comment on Development Project
- Violation/Citation Appeal

*Example Request Submission from the Online Portal*

## 2.6 Reporting, Dashboards, & Analytics

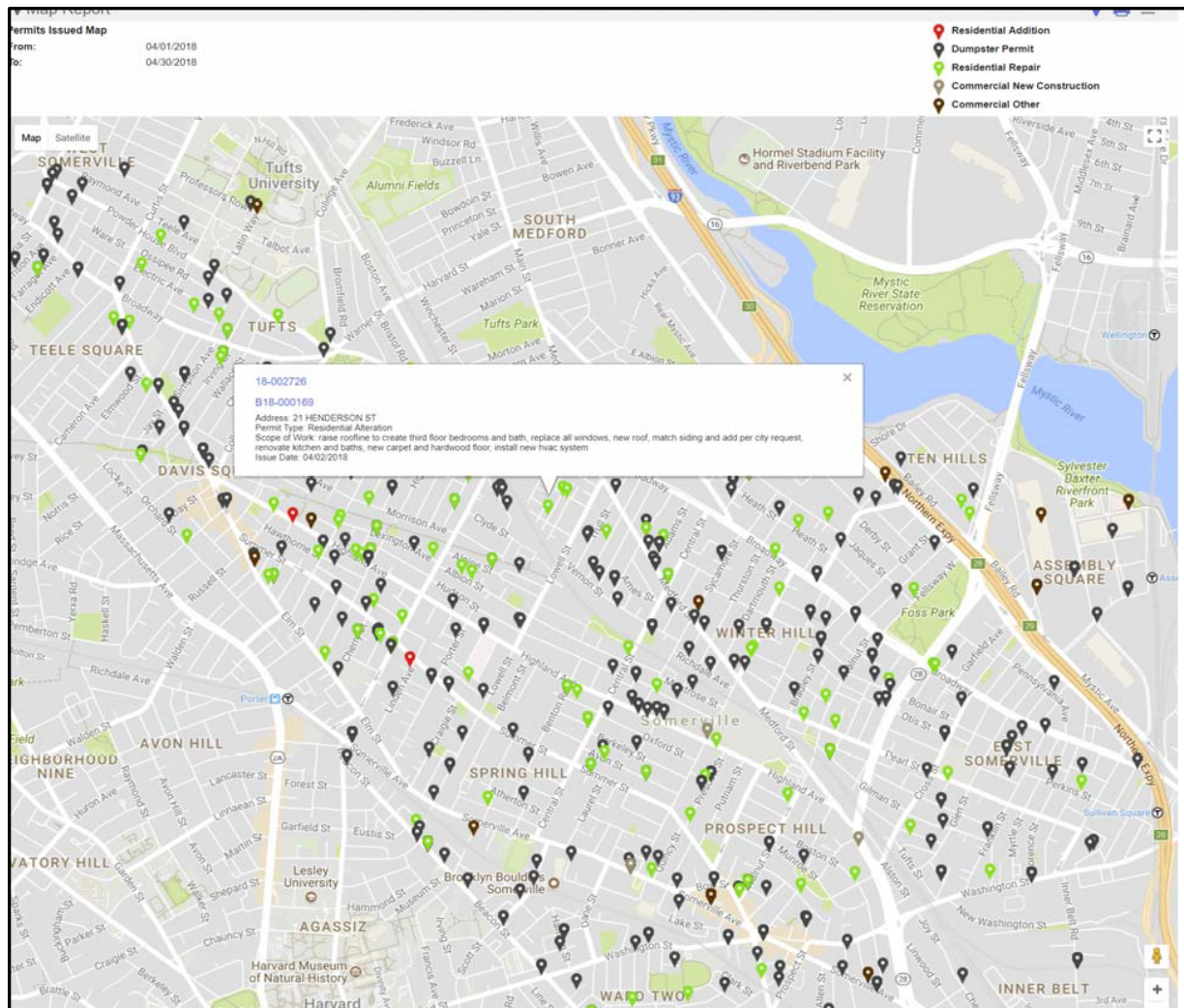
### *Reporting*

While citzenserve has a robust list of standard reports, most customers request custom reports to meet individual business decisions and processes. The Citzenserve implementation manager will provide guidance to the Town's team members on the iterative process of identifying reports by functional area, including leveraging reporting and best practices from other customers.

Each citzenserve subscription includes the development of an **unlimited** number of custom reports. Reports can be tabular, maps, and charts. We will work with the Town during implementation to identify and develop the required reports; post go live, the Town's subscription includes the development of an unlimited number of additional custom reports.

Citizenserve reports are rendered in HTML and the software has built-in features to interactively display data. HTML can be used within the reports; for example, a link to a GIS or a graphic displaying status. The reports are interactive; a click on a map report will show the underlying tabular information and provide a link to the underlying file, such as a permit or license. Citzenserve also supports merge reports where the information from the report is merged with a template letter or email; merge reports can save a copy of the letters generated.





Sample Citienserve Map Report

Reports can also be used to create special features, such as a property zoning lookup. Reports can perform processing, such as a report that generates invoices, late fees, or penalties. Tabular reports can be exported to Excel format. Any report can be saved as a PDF for archiving. The Town can also choose to have any report placed on your online portal for the public.

There is a built-in end-user reporting wizard in citizenserve that allows non-technical users to design their own reports and share the reports with others. The reporting tool allows users to report on any fields in the database, including custom fields. End users can create their own tabular, map, chart, and merge reports.

**CREATE A REPORT**

**REPORT INFORMATION**

Report Name  
Open Permit Applications Greater Than 30 Days

Display Type  
List

Save In Folder  
My Report

Data Type  
Permits

Description  
Add this report to my home page

**SELECT FIELDS TO DISPLAY ON YOUR REPORT**

Available fields to add to your reports  
All Fields

- Valuation
- Applicant: Company Name
- Applicant: Work Phone
- Applicant: Home Phone
- Applicant: Mobile Phone
- Applicant: Fax Phone
- Applicant: Email
- Building Sewer (qty)
- Gas Test Only
- I agree to electronically sign and to create a le
- If yes, Sprinkler Heads (qty)
- Is applicant the property owner
- Lawn Sprinkler System
- Plumbing fixtures, trap or set of fixtures on one
- Sign
- Water Heater and Vent (qty)
- Water piping installation for water testing (qty)
- # of stories
- # Radios in Use
- ADDITIONAL OPTIONS
- ACKNOWLEDGEMENT

Selected fields that will appear on your report

- Permit#
- Permit Type
- Application Date
- Status
- Applicant: Name
- Applicant: Business Address
- Applicant: BusinessCity State Zip

Up

Down

**ADD FILTERS TO DETERMINE WHAT DATA WILL APPEAR ON YOUR REPORT**

Application Date

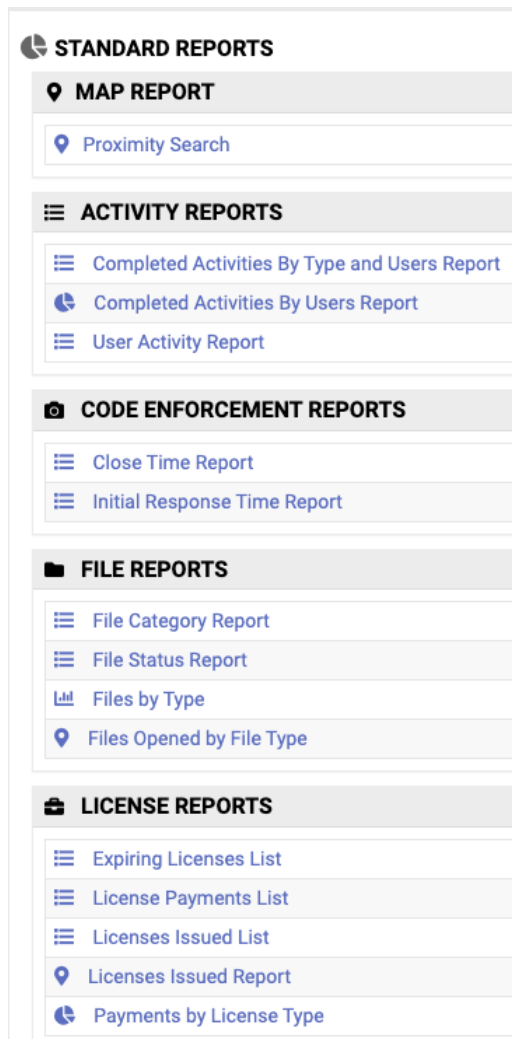
Filter: Greater than

**ADD TOTALS TO YOUR REPORT**

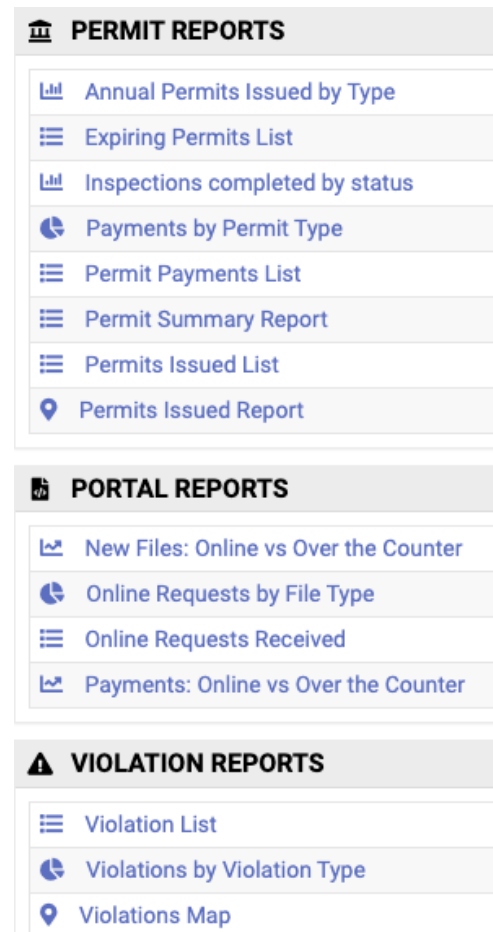
Select fields...

*Citizenserve's Reporting Wizard Enables the Inclusion of Any Field, Mathematical Conditions, and Totals*

Citizenserve has a robust offering of standard reports. Don't see the report you need? You can create your own report with citizenserve's reporting wizard, or have a custom report developed for you by a Citizenserve Support team member in less than a day.

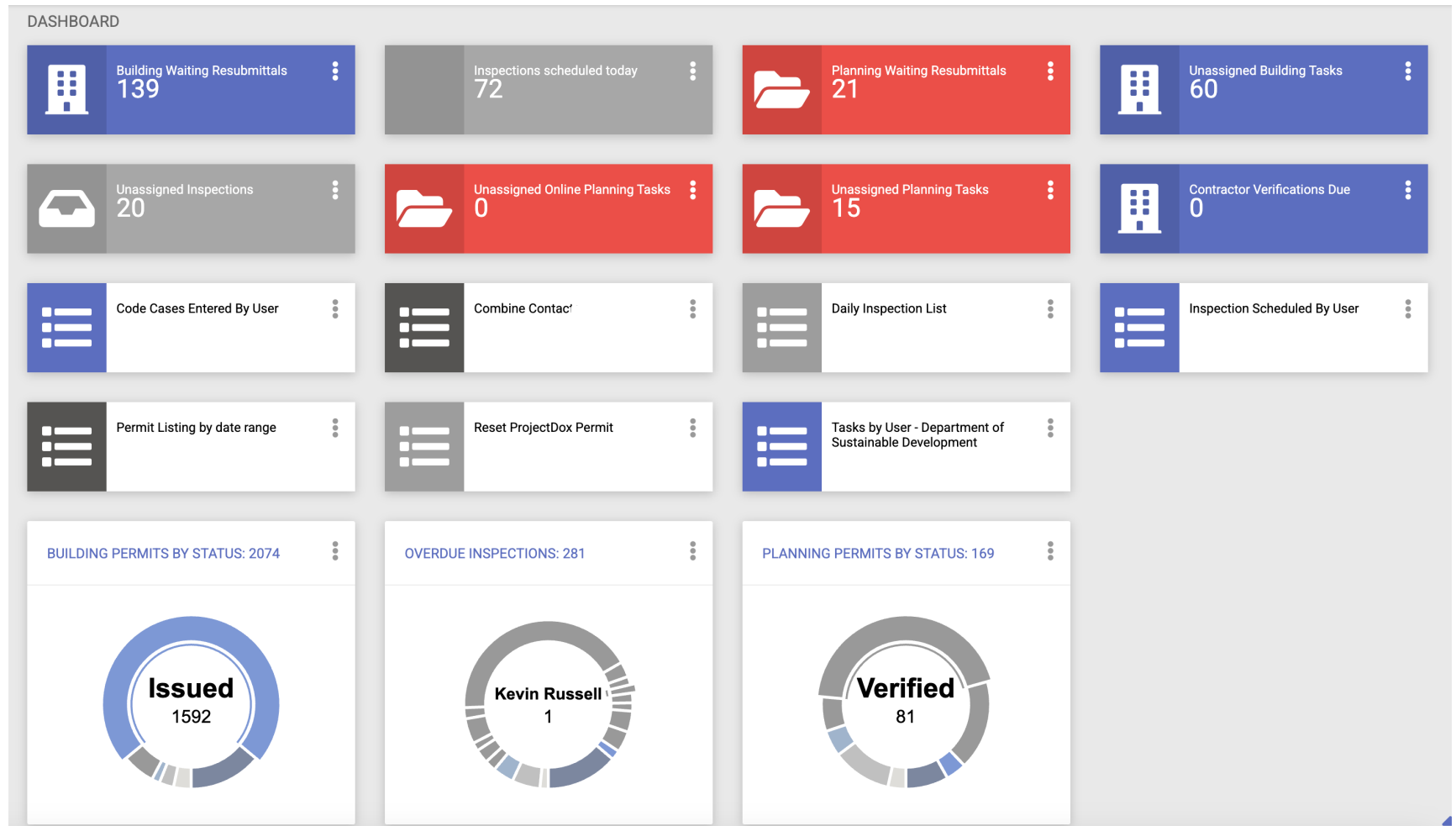


*Citizenserve Standard Reports (page 1)*



*Citizenserve Standard Reports (page 2)*

## Dashboards & Analytics

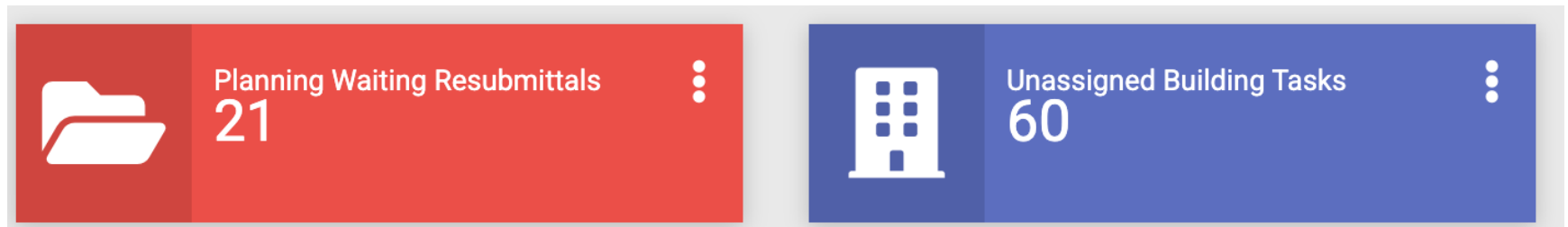


Example citizenserve dashboard for a departmental manager

Citizenserve provides multiple dashboards to enable your users to quickly obtain the information and insights they need, such as a real-time display of overdue inspections or a comparison of plan review completion time by staff member. Dashboards are very easy to configure and change by simply selecting the desired metrics from a list of available metrics, or Citizenserve will create any custom metric containing the data a user requests as part of our unlimited support. Four types of metrics are available: chart, report, single, and trend metrics. Examples of dashboard metrics include:

- Open permits by type,
- Permits awaiting resubmittal by type,
- Assigned review tasks by staff member,
- List of overdue inspections.

**Single Item Metrics.** Single item metrics provide quick access to your most important metrics. Each metric is fully customizable, including the data that is displayed when you click the metric to view detailed information.

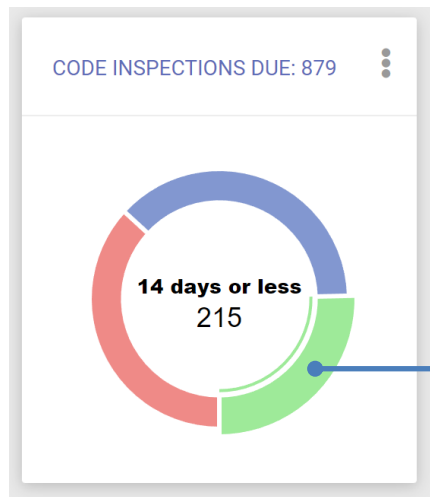


*Example of two single item metrics from a departmental manager's dashboard*

PLANNING WAITING RESUBMITTALS							
PERMIT#	ADDRESS	APPLICATION DATE	PERMIT TYPE	SUB TYPE	DESCRIPTION	NOTES	BALANCE DUE
COA23-000103	473 NW 7TH AVE	09/18/2023	Certificate of Appropriateness	New Construction	Cowvins - New Construction	8/12/24 - reminder email sent. AP 5/14/24 - reminder email sent about payment due, cc'd Kathleen. Alert added to permit. AP 2/13/24 - emailed reminder for payment needed, let Kathleen know still waiting on payment. AP 10/20/23 - kicked back for outstanding balance, also emailed Lawrence. AP	77.05
OD24-000022	619 W UNIVERSITY AVE	12/27/2024	Outdoor Dining Permit	Food Truck	Di big jerk	1/15/25 - follow up email sent still waiting on permit cancellation/refund request. AP 12/27/24 - called and spoke with applicant, he is trying to get a peddlers permit, he is not set up at any specific address. waiting for permit cancellation/refund request form. AP	0.00
ZV25-000074	6342 NW 18TH DR STE 3	04/07/2025	Zoning Verification	Zoning Verification	Wyatt's Coffee LLC. DBA Resident Coffee Roasters	04/07/2025- waiting on payment and need to know the square footage of location to determine use. AS	25.00
ZV25-000092		04/22/2025	Zoning Verification	Zoning Verification	891 SW 4th Ave	04/23-The request was supposed to be a Zoning Compliance letter not a zoning Verification. waiting on cancelation. AS	0.00
COA24-000067	301 NW 2ND ST	07/22/2024	Certificate of Appropriateness	Alteration	Replacing 26 windows (some are currently vinyl, looking to replace with vinyl, non-vinyl windows looking to replace with aluminum/wood hybrid), adding gutters, and putting new cap on chimney to repair it	7/26/24 - photos are added, Kathleen called and left them a message about doing a site visit. AP 7/22/24 - homeowners would like to discuss the existing vinyl windows with Kathleen before providing manufacturer info because they cannot order the windows before knowing if allowed. also waiting for them to send rest of pics. AP	0.00
ZL24-000076	806 NE WALDO RD	11/18/2024	Zoning Code Compliance Letter	Zoning Code Compliance Letter	CONVENIENCE STORE/RETAIL SALES/BEER & WHINE/LIQUOR/FOOD & BEVERAGE	1/15/25 - follow up email is sent, waiting on cancellation/refund form. AP 11/21/24 - emailed applicant to confirm if there is a template or if a ZVF was needed instead. Confirmed a ZVF is needed instead, waiting on permit cancellation and refund request form. AP 11/19- Tony Called to check on Status I let him know it was in the que to process and would be 5-7 business days. AS	0.00
ZL25-000018	3700 SW 42ND ST	04/16/2025	Zoning Code Compliance Letter	Zoning Code Compliance Letter	81 Room Hotel		71.59
COA24-000006	1004 SW 6TH AVE	01/15/2024	Certificate of Appropriateness	Alteration	Replace 2 Windows	7/22/24 - update per Kathleen, requesting vinyl windows on front of contributing waiting for them to find alternative. AP 5/14/24 - pending issue with the window material per past conversations in the historic chat. AP 1/24/24 - kicked back for paper app, it was received and is under documents tab. AP	0.00
LD24-000118	751 NE 34TH PL	11/15/2024	Land Development Application	Minor	24x25 Detached accessory shell only no mep	1/15/25 - meeting has been done, FSM24-000156, sending follow up about missing payment. AP 11/18/24 - per Miranda and past conversations about the project, a FSM is needed. AP	2,311.90
COA23-000108	602 NW 4TH ST	09/26/2023	Certificate of Appropriateness	Fence or Wall	Fence Replacement	8/12/24 - reminder email sent. AP 5/14/24 - reminder email about missing payment sent, cc'd Kathleen. Alert added to property. AP 2/13/24 - emailed reminder for payment needed (was already approved at Board), let Kathleen know still waiting on payment. AP 11/13/23 - Kathleen confirmed this was approved at Board, confirmed with her to add the fee now and have emailed the applicant for payment. AP 10/10/23 - waiting on Kathleen to confirm if this will be Board, she is waiting on additional info from applicant. AP	77.05
ZV24-000257	4400 SW 20TH	12/09/2024	Zoning Verification	Zoning	Canopy Apts	1/15/25 - follow up email sent, waiting on permit cancellation/refund request form. AP 12/10/24 -	0.00

*Example single item metrics. Clicking on the Planning Waiting Resubmittals metric opens the list of associated files.*

**Chart Metrics.** Chart metrics give you the ability to view complex performance metrics in a single graph. Each metric is fully customizable and there is no limit to the number of metrics you can have.



Hovering over a different colored segment of the chart displays specific information; in this case, the user is displaying the number of code inspections that are due in 14 days or less. Clicking on the segment opens the related list of code inspections.

#### *Example Chart Metric*

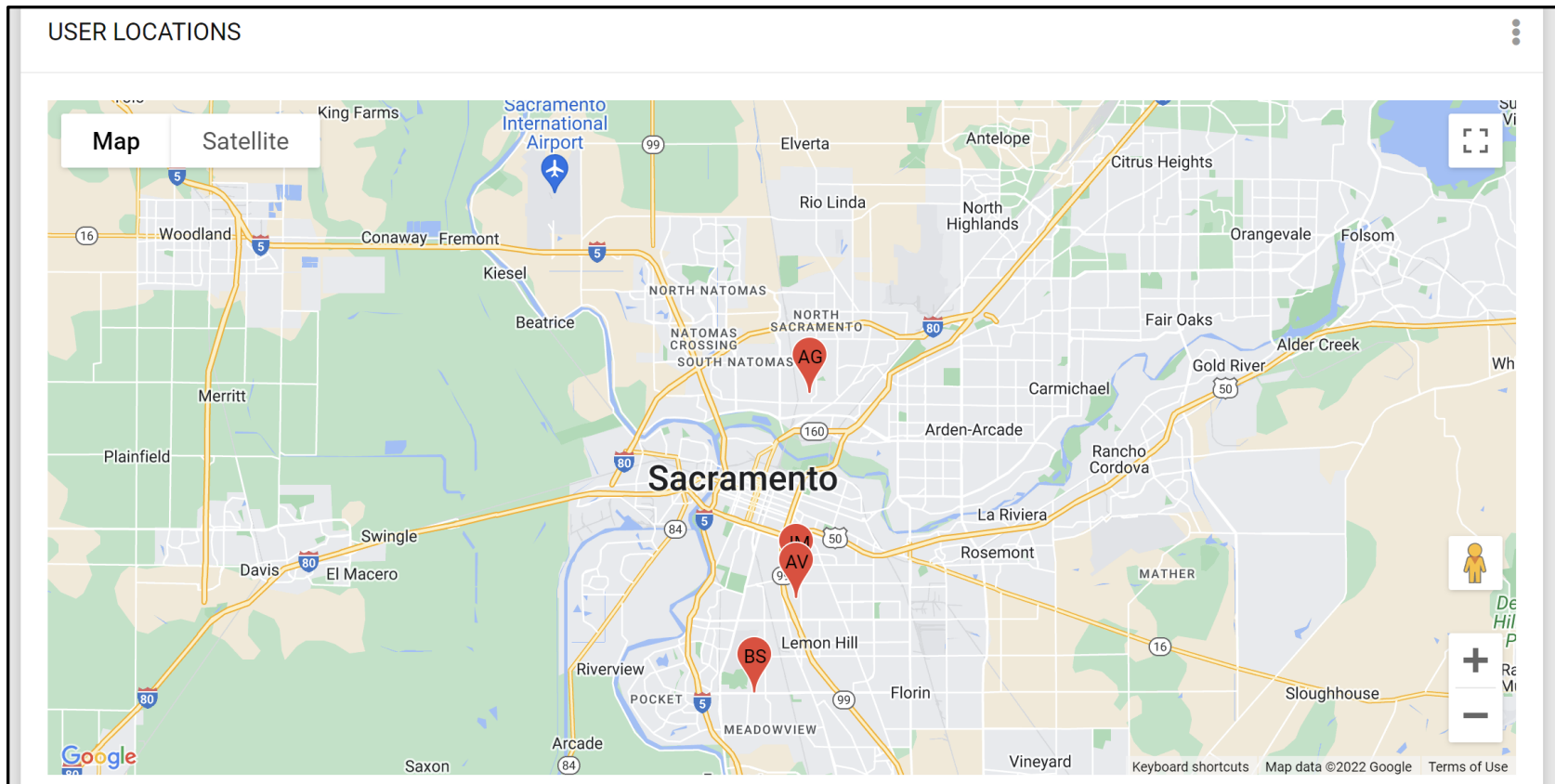
**Trend Metrics.** Trend metrics give you the ability to view data over time, such as number of inspections, response time, or number of cases opened. Trend metrics are fully customizable and can be set up for annual, monthly, weekly, or daily comparisons.

INSPECTIONS BY DATE		
JANUARY	4,981	INSPECTIONS
FEBRUARY	5,349	INSPECTIONS
MARCH	6,777	INSPECTIONS
APRIL	6,603	INSPECTIONS
MAY	6,339	INSPECTIONS
JUNE	7,021	INSPECTIONS
JULY	5,675	INSPECTIONS
AUGUST	8,073	INSPECTIONS
SEPTEMBER	1,856	INSPECTIONS
OCTOBER	1	INSPECTIONS
NOVEMBER	0	INSPECTIONS
DECEMBER	0	INSPECTIONS
TOTAL INSPECTIONS THIS YEAR	52,675	INSPECTIONS
AVERAGE MONTHLY INSPECTIONS	5,267	INSPECTIONS

### *Example Trend Metric*

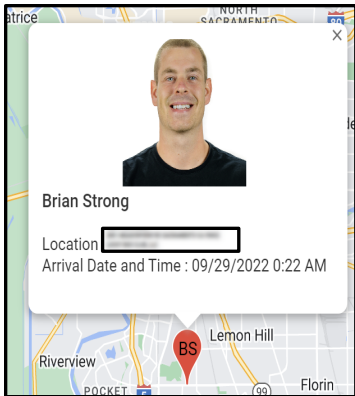
**User Locations.** With user locations you can see exactly where your inspectors are in the field at any time. This functionality can be turned off if preferred.





*Example User Locations Map*

Clicking on the map marker will display the inspector, the location, and the arrival date and time.

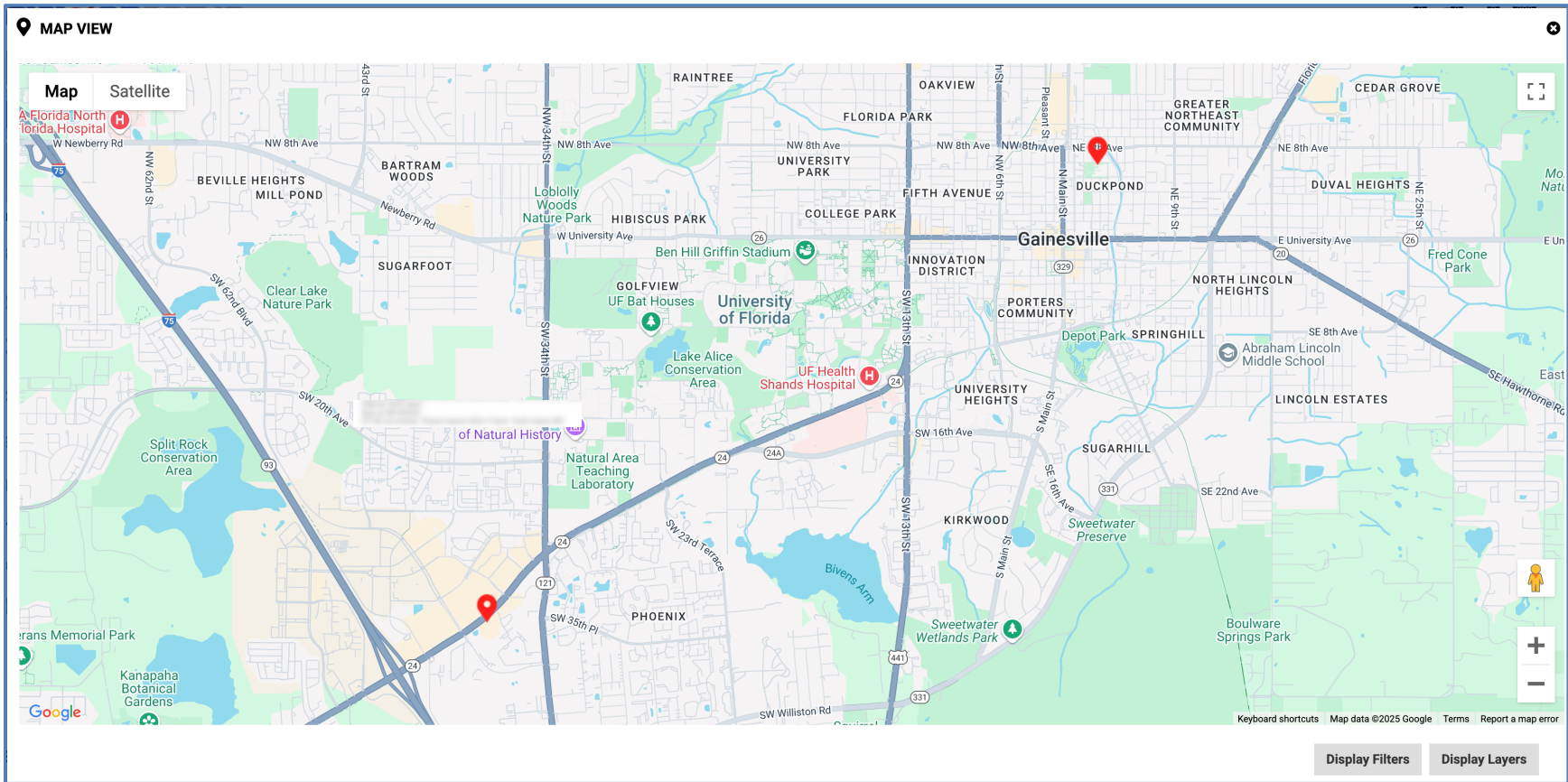


*Example Inspector Drill Down*

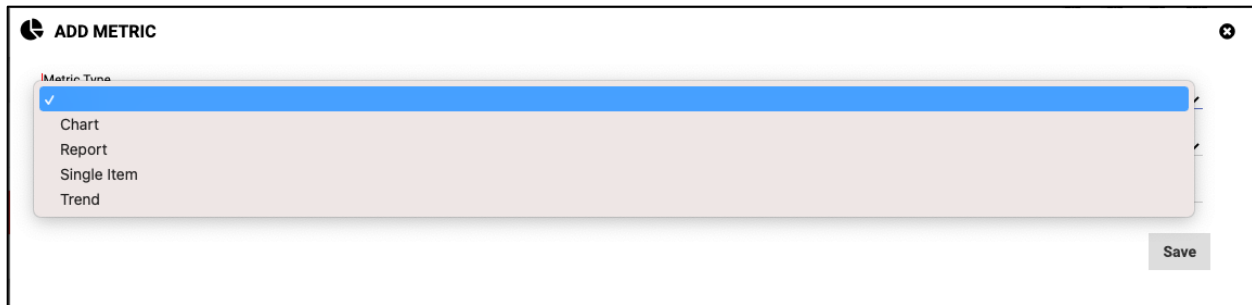
**My Tasks.** With the My Tasks list each user can view their inspections or tasks due on a list (shown below) or a map (accessed by selecting Map View from the drop-down). You can filter by status, priority, or due date.

MY TASKS						
TYPE	NUMBER	DUE DATE	PROPERTY ADDRESS	FILE DESCRIPTION	STATUS	
Online Inspection Rescheduled Notice	SW22-000019	05/18/2023	3621 SW ARCHER RD	Chick-Fil-A (AD-21-00029)		
<span>!</span> Planning Application Intake	ZV23-000294	12/02/2023	306 NE 6TH AVE	ZV test		

*View Your Inspections or Tasks Due in a List View*

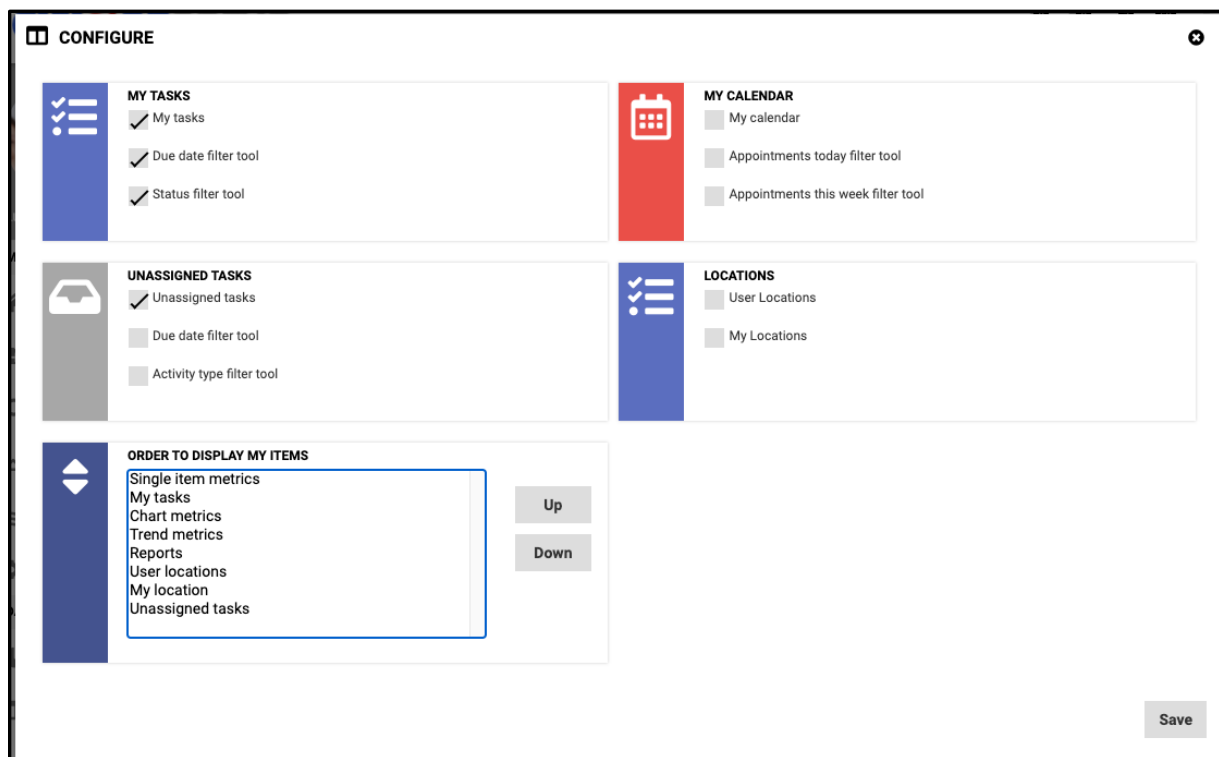


*View your inspections or tasks due in a map view*



### *Each User Can Add Metrics to Individual Dashboards*

Each user can add metrics and configure their individual dashboard to display the metrics of interest, and it's easy to request custom metrics anytime from Citizenserve's Support Center.



## **2.7 Document Management & Retention**

Citizenserve has flexible document management and retention and includes unlimited document storage. Documents and images can be opened from any device, including from mobile devices in the field. Documents are date and time stamped.

- Citizens, contractors, and businesses can submit required documentation such as site plans and insurance certificates through the citizenserve online portal, and the documents are automatically associated with the relevant case, project, property, contact, and/or application.

- Citzenserve accommodates the upload of all file types except for executables (for security reasons), including PDF, CAD, and image files.
- Inspectors can attach documents from the field, including photos, notices of violation, certificates of occupancy, or other documentation generated during an inspection.
- Staff can generate letters, emails, and other documentation that are automatically associated with the case, property, and application.
- As part of the plan review process, new versions of plans that contain markups are automatically associated with the relevant case, property, and application.
- Staff can upload and attach any additional documentation related to a case, property, and/or application.
- *Citizenserve subscriptions include unlimited storage.* You will never be restricted in the amount of storage used.

# SECTION 3 – IMPLEMENTATION APPROACH

## 3.1 Citizenserve Implementation Approach

We use an agile methodology for our project implementations; our approach involves the following steps.

**Completion of the Setup Checklist.** The Citizenserve account manager provides a Setup Checklist of supporting documentation that will be required to begin the setup. The supporting documentation typically includes items like copies of permit and license applications, fee structures, certificates, notices and forms, etc. The customer's team gathers all the documentation and information included in the Setup Checklist. Gathering all the documentation on the setup document prior to project kickoff ensures the most efficient implementation.

**Project Kickoff.** The project kickoff meeting includes the key customer and Citizenserve team members. Key components of the project are discussed including roles, responsibilities, timeline, and objectives. The Citizenserve account manager provides a report summarizing the meeting and assigning action items.

**Initial Setup.** The Citizenserve implementation manager works from the information on the Setup Checklist to configure the system; typically, the initial setup comprises 50% of the entire setup. Automated AI tools support rapid configuration of permit and license applications and code cases so your team members can quickly begin providing feedback.

**System Walkthroughs.** Once the initial setup is complete, a weekly meeting is scheduled with the customer team and the Citizenserve implementation manager. During the weekly walkthrough meetings, the Town's key users will meet with Citizenserve to review new work and identify requirements. The key users also spend hands-on time every week in between the meetings to try out the new functionality and identify needed changes. This process continues until the Town is ready to go live. Rapid progress is made, the users become extremely familiar with the configuration, and new approaches can be tried. Changes in requirements are expected and welcomed, as we recognize that the knowledge gained through the project will lead to new ideas and improvements.

**System Integration.** The Citizenserve solution architect will write and test the integration scripts; Town staff will test the integrations for accuracy. The Citizenserve solution architect will make any required changes to the integrations.

**Training.** Prior to go live, staff members will be trained in small groups. Our traditional approach to training is to conduct training via web conferencing in small groups; unlimited live web conferencing training is included as part of implementation and post go live as part of Citizenserve's unlimited support. With web conferencing, we can transfer screen control to the users, so they obtain experience using the system during training. Any of the web conferences used for training can be recorded and edited for later viewing.

Each training session will focus on that group's core job responsibilities. Most users attend one or two training sessions that last up to 2.5 hours; additional one-on-one training sessions can be scheduled for anyone who would benefit from additional training. With online training we can record any or all the training sessions and make the training videos available online. Unlimited live, instructor-led online training is included post go live as part of Citizenserve's unlimited support.

We create each training class custom to accommodate a customer's specific business processes and configurations. Training includes various training scenarios and exploration of different workflows. We provide comprehensive training on the full functionality of the system. Training documentation will be specific to the Town and to each group's job responsibilities.

**Go Live.** Go lives are typically scheduled to occur over a weekend. Over the weekend all test data is removed from the system and any production configurations (such as the payment processor) are added. The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial; the Town decides when they are comfortable with the system and no longer require the weekly walkthrough meetings.

**Ongoing Support.** Users can request support for any needs or questions through the Citizenserve Support Center. Response time to a standard support request is within one (1) hour; urgent requests receive a response within 15 minutes. Our support staff members are available to resolve issues, develop custom reports, make edits to certificate templates, help you utilize existing and new features, modify your setup for process changes, and provide unlimited user training.

### **3.2 Citizenserve Training Approach**

Online, instructor-led training for all users is included as part of the implementation costs, and Citizenserve's unlimited support includes unlimited online, instructor-led training post go live. We will create a training environment that contains your configuration and data; your users will therefore be training using an environment in which they are familiar. This training environment will be available in the pre go live training sessions and can be made available for additional post go live training, as necessary.

Our traditional approach to training is to conduct instructor-led training via web conferencing in small groups, and the vast majority of our customers employ this method of training. We provide unlimited web conferencing training. With web conferencing we can transfer screen control to the users, so they obtain experience using the system during training. Any of the web conferences used for training can be recorded and edited for later viewing.

#### *Staff User Training*

Staff members are trained prior to go-live. Each training session focuses on a specific group's core job responsibilities. We create each training class custom to accommodate a customer's specific business processes and configurations. Training includes various training scenarios and exploration of different workflows. We provide comprehensive training on the full functionality of the system. Training documentation will be specific to the Town and to each group's job responsibilities; for example, plan reviewers will receive different training than inspectors.

Most users attend one or two training sessions that last from 1.5 to 2.5 hours; additional one-on-one training sessions can be scheduled for users who would benefit from additional training.

#### *Public Portal Training*

We have a library of useful [training videos](#) that can be linked to the portal and are constantly adding new content.



### **3.3 Citizenserve Unlimited Support and Maintenance**

Citizenserve offers unlimited support and training for the life of the subscription. The support extends to addressing any issues, adding new permits and licenses, setting up new workflows, changes in fee schedules, writing custom reports, and user training. The employees who staff the support desk are the same resources that work on project implementations; each of our implementation staff is assigned to a support shift once a week. This structure means that when you contact support, you will be working with someone who is an expert and extremely familiar with all aspects of the system.

#### *Support Desk Processes*

We have a toll-free support line that any user can use to request support. The software also has a built-in Support Center and we encourage users to use this feature to submit requests for support help and enhancements. Where other vendors set the priority of support requests or rely on an algorithm to do so, Citizenserve empowers our users to identify the severity of their problem. Users can mark their request as Standard (response within 1 hour, average response time of 17 minutes) or Urgent (response within 15 minutes, average response time of 6 minutes). Users select from a drop-down menu of issue types to aid in describing the problem.




**SUBMIT A NEW REQUEST**


What can we help you with today?



Priority  
Standard

Your Phone  
503-515-2233

Your Email  
kara@citizenserve.com

Add Attachment
Save

*Support Center Request Submission Form (View 1)*




**SUBMIT A NEW REQUEST**


What can we help you with today?

☒ A question related to a specific file  
Admin options (adding inspection types, violations, review routes, etc.)  
Fee structure changes (changes to how your permit or license fees are calculated)  
Letter or email templates  
Portal changes or questions  
Reports  
User account changes or additions  
Training  
Something else

*Support Center Request Submission Form (View 2)*

Once a user selects an option from the “What can we help you with today?” menu, they are presented with a field where they can type a description of the problem or request. Users can add one or more attachments to aid in diagnosing the issue or providing detail on the enhancement request.


**SUBMIT A NEW REQUEST**


What can we help you with today?  
Reports

Would you like to make changes to an existing report or create a new report?  
Create a new report

Please describe the report you would like to create:  
I would like a new report that identifies all application review tasks older than 7 days

Priority  
Standard

Your Phone  
503-515-2233

Your Email  
kara@citizenserve.com

Add Attachment
Save

### *Support Center Request Submission Form (View 3)*

We have implemented artificial intelligence (AI) in our Support Center that analyzes incoming customer requests and the availability of support staff to intelligently assign the support request to the most appropriate staff member. This innovation has resulted in a reduction in the handoffs of support tickets and the time required to close them, providing more timely support for our customers.

The user who submitted the request will be notified that the ticket has been assigned; the Citizenserve support team member will contact the user for any information required to troubleshoot the issue.

As a Software-as-a-Service company, we remotely service customers who are geographically distributed. We use web conferencing, conference calls, and emails to provide support. Using web conferencing for support allows us to provide higher quality resources in a timelier fashion while providing consistency in the people with whom your staff will be working. We can also view the user's screen; the user can walk us through the issue they are experiencing, and this visibility supports rapid troubleshooting.

### *Citizenserve Response Times*

Where other vendors set the priority of support requests or rely on an algorithm to do so, Citizenserve empowers our users to identify the severity of their problem. Users can mark their request as Standard or Urgent. We respond to standard requests within one business hour (average response time of 17 minutes) and urgent requests within 15 minutes (average response time of 6 minutes). For urgent system requests, Citizenserve staff are available

24/7/365. Urgent requests trigger notification to senior members of Citizenserve, who determine the best resources to resolve the issue.

We resolve over 84% of all tickets within one day.

### *Support Hours*

Support requests can be marked as standard or urgent. Users determine the priority of their requests. All support staff are seasoned Citizenserve employees.

- For standard requests, support staff are available from 7:00 a.m. Central Time through 7:00 p.m. Central Time during non-holiday business days (Monday – Friday). Response is within one business hour; average response time of 17 minutes.
- For urgent system requests, Citizenserve staff are available 24/7/365. Response is within 15 minutes; average response time of 6 minutes.

### *Maintenance*

Citizenserve also provides full system maintenance with every subscription. You will not need a technical team to install and maintain the software, optimize the database, patch the servers, handle system security, or monitor the performance; Citizenserve provides all these services as part of the subscription. As a hosted solution, Citizenserve staff monitor the performance of the system. The application servers and database are monitored continuously with alerting to ensure the continued optimal performance of the system. Processor utilization, pages, memory utilization, and replication are all monitored. Expensive queries are easily identified and can be optimized on a continual basis.

### *System Updates*

We release new features and any fixes once to twice a month; all are included in the Citizenserve subscription. Our model is not the typical “big bang” version upgrade that combines long lists of enhancement requests that have been gathered over months or years, with no improvement to the software between versions. Citizenserve is continually improving based upon customer feedback and requested enhancements.

Requests for new features and functionality (enhancements) are tracked in the Support Center that is built into citizenserve. Users can subscribe to the updates and get a list via email of all the changes and fixes in the most recent version before it is released. New features are offered as configuration options; customers can choose not to use a new feature. We implement over 70% of the enhancement requests we receive each year.

A Citizenserve subscription also includes major upgrades, which occur every few years – we are currently rolling out a major upgrade to our portal. Major upgrades and the associated change management and training are offered with every subscription. With new major features, the customers who requested these features are in the vanguard of testing the feature in the test environment and in moving to the feature or upgrade, providing us with great feedback early on so we can refine the features and fix any issues without affecting other customers, all while still on one software code base.

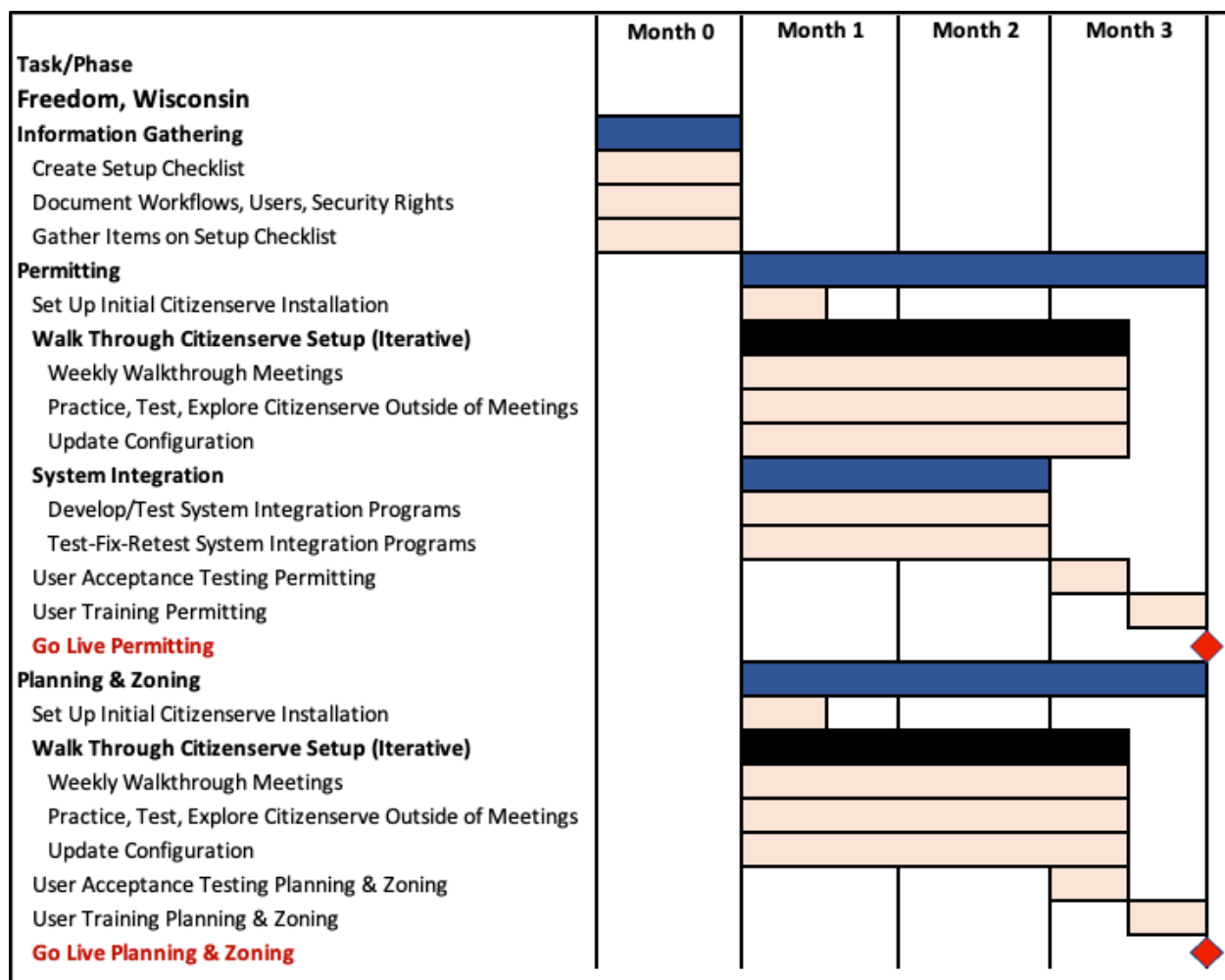
### **3.4 Town's Data**

The Town owns its data; our Service Agreement includes a clause that acknowledges the customer is the sole owner of its data. Upon contract termination, we will provide the Town with a copy of your data in Microsoft SQL Server backup format (.bak).

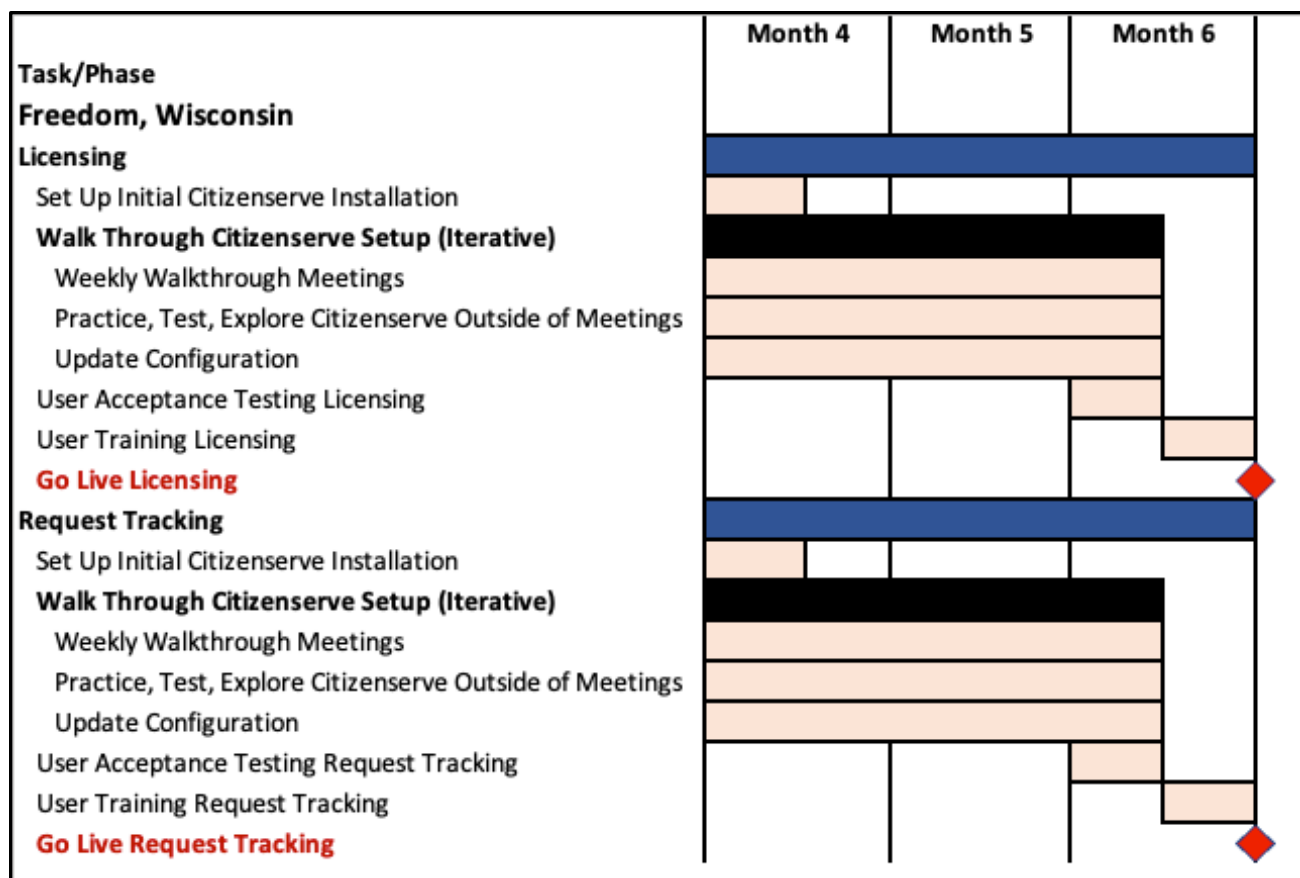
### **3.5 Draft Project Schedule**

We have included a draft project schedule below. The Town has requested a 6-month implementation schedule; with our AI tools that support the rapid build of permit and license applications and code cases, our implementations eliminate many of the more time-intensive configurations and thus support rapid go lives. We made the following assumptions when developing the project schedule:

- We assume that the Town team will collect the required information on the setup checklist provided by Citizenserve prior to the beginning of the project, including copies of permit and license applications, fee schedules, letters and notifications, etc. The timely start of the project depends upon the collection of this information.
- We assume that knowledgeable subject matter experts from each area will be available for the weekly walkthrough meetings as scheduled.
- We assume that Town team members will complete their assignments in the days between the weekly walkthrough meetings.
- We assume the Town will ensure the attendance of key users in training classes.
- We have scheduled two phases that include the implementation of two modules per phase; this sequencing is to accommodate the Town's request to complete the implementation within six (6) months.
- Because the integrations for the project are common across modules, system integration is only scheduled to occur in Phase 1.
- We have labeled the schedule "draft" because it requires the Town's input.



Freedom, Wisconsin Citizenserve Implementation – Phase 1



*Freedom, Wisconsin Citizenserve Implementation – Phase 2*

# SECTION 4 – PROJECT BUDGET

## 4.1 Annual Subscription Fees

Citizenserve is only offered as an annual subscription. Subscription pricing is tiered based on number of users. A Citizenserve subscription includes all the citizenserve modules:

- Permitting,
- Planning & Zoning,
- Code Enforcement,
- Licensing, and
- Request Tracking.

The Citizenserve subscription includes:

- hosting and administration of the servers and other hardware,
- the electronic markup tool,
- online portal, and
- document repository with unlimited storage.

A subscription includes unlimited support and maintenance; the Town will never be charged a separate maintenance or support fee. Administrative support is also included in the subscription. Citizenserve's unlimited support extends to addressing any issues, improving existing processes, setting up new workflows, adding new permit and license types, adding new fee structures, writing custom reports, user training, and configuring new features.

A few additional clarifications on the annual subscription pricing:

- A subscription is NOT required for the online portal; the Town will not be charged for the citizens, businesses, contractors, and other constituents who use the portal.
- Mobile access to Citizenserve is included; no separate application is required.
- Annual subscriptions are priced by named user. The Town can add users at any time; subscriptions are prorated to the term of the subscription.

Number of Users	Annual Cost Per Named User
5 (5 user minimum)	\$2,700
6 - 10	\$2,400
11 - 24	\$2,100
25 - 49	\$1,800
50+	\$1,500

The Town specified 5 - 10 users. The annual cost per user for 5 users is \$2,700; the annual cost per user for 6 – 10 users is \$2,400.

#### **4.2 Implementation, Configuration, Project Management, & Training**

Implementation, configuration, project management, and instructor-led web conferencing training are provided for a flat, one-time fee of \$1,500 per named user. If the Town later adds users to the subscription, there will be a one-time charge of \$1,500 for each new user.

#### **4.3 System Integrations**

We have provided pricing for the following integrations. If the Town decides it does not require one or more of the listed integrations, the corresponding price can be removed from the fixed price bid.

- Outagamie County ESRI ArcGIS,
- Batch payment files FTPed for upload into Workhorse, and
- To-be-determined payment processor \*.

\* If the City selects a payment processor and version for which we have already established integration, there will be no charge for this integration; see the following list. We will assist the Town in selecting a payment processor that accommodates debit cards and ACH payments. There is a one-time charge of \$15,000 for integration to payment processors that are not on the list.



- ACI Universal Official Payments
- BIQ SHO
- CityHall Payment
- Convergys
- EGov Payment
- Forte
- Government Windows
- Invoicecloud
- Kubra EZ-Pay
- OpenEdge HostPay
- Payeezy
- Pay Connect
- Paypal
- Point and Pay
- PSN
- Unipay
- Xpress Bill Pay 3.0
- Authorize.Net v2
- Bluefin PayConex
- Civitek Paynow V2
- CyberSource 4.0
- ETS
- GovPayNet
- Heartland Bolletta Pay
- JetPay Magic
- MuniciPay
- Paybill
- PayExpressPay
- Paymentus Payment
- Payflow Pro
- PlugnPay
- SCGovPEGV3
- VPS
- 

*Available existing payment processor integrations*

Systems Integration	Fixed Price
Outagamie ESRI ArcGIS	\$10,000
Batch Payment Files FTPed to Workhorse	\$2,500
TBD Payment Processor	\$0
<b>Total Integration Price</b>	<b>\$12,500</b>

#### 4.5 Citizenserve Five-Year Budget Matrices

We have prepared five-year budget matrices for 5, 6, 7, 8, 9, and 10 users. The matrices have been prepared for you based on our understanding of your needs as outlined in the RFP and answers to questions.

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (5 users)	\$13,500	\$13,500	\$13,500	\$13,500	\$13,500
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (5 users)	\$7,500				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$20,000				
Total Annual Fees	\$33,500	\$13,500	\$13,500	\$13,500	\$13,500

*Citizenserve Five-Year Budget for Freedom, Wisconsin (5 users)*

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (6 users)	\$14,400	\$14,400	\$14,400	\$14,400	\$14,400
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (6 users)	\$9,000				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$21,500				
Total Annual Fees	\$35,900	\$14,400	\$14,400	\$14,400	\$14,400

*Citizenserve Five-Year Budget for Freedom, Wisconsin (6 users)*

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (7 users)	\$16,800	\$16,800	\$16,800	\$16,800	\$16,800
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (7 users)	\$10,500				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$23,000				
<b>Total Annual Fees</b>	<b>\$39,800</b>	<b>\$16,800</b>	<b>\$16,800</b>	<b>\$16,800</b>	<b>\$16,800</b>

*Citizenserve Five-Year Budget for Freedom, Wisconsin 7 users)*

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (8 users)	\$19,200	\$19,200	\$19,200	\$19,200	\$19,200
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (8 users)	\$12,000				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$24,500				
<b>Total Annual Fees</b>	<b>\$43,700</b>	<b>\$19,200</b>	<b>\$19,200</b>	<b>\$19,200</b>	<b>\$19,200</b>

*Citizenserve Five-Year Budget for Freedom, Wisconsin (8 users)*

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (9 users)	\$21,600	\$21,600	\$21,600	\$21,600	\$21,600
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (9 users)	\$13,500				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$26,000				
<b>Total Annual Fees</b>	<b>\$47,600</b>	<b>\$21,600</b>	<b>\$21,600</b>	<b>\$21,600</b>	<b>\$21,600</b>

*Citizenserve Five-Year Budget for Freedom, Wisconsin 9 users)*

Cost Element	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Citizenserve Subscription (10 users)	\$24,000	\$24,000	\$24,000	\$24,000	\$24,000
One-Time Initial Fees					
Citizenserve Implementation, Configuration, & Online Training (10 users)	\$15,000				
Integration to Outagamie County ESRI ArcGIS	\$10,000				
Batch Payment Files FTPed to Workhorse	\$2,500				
Integration to TBD Payment Processor	\$0				
Total One-Time Fees	\$27,500				
<b>Total Annual Fees</b>	<b>\$51,500</b>	<b>\$24,000</b>	<b>\$24,000</b>	<b>\$24,000</b>	<b>\$24,000</b>

*Citizenserve Five-Year Budget for Freedom, Wisconsin (10 users)*

## SECTION 5 – CITIZENSERVE REFERENCES

Citizenserve’s existing client base consists of towns, cities, counties, and other municipalities throughout the United States that have community development functions. We have over 300 customers, some of whom have been using citizenserve since the inception of the company. We have included references below for projects that are similar in nature to the project requested by the Town for customers with populations less than 10,000.

Reference 1: Polk City, Iowa	
<b>Contact Name:</b> Cody Olson	<b>Contact Title:</b> Building Official
<b>Contact Phone:</b> 515-795-7488	<b>Contact Email:</b> colson@polkcityia.gov
<b>Citizenserve Modules:</b> Permitting, Development Projects, Code Enforcement, Request Tracking, <a href="#">Online Portal</a> .	<b>Additional Services:</b> System Integration
<b>Overall Project Scope:</b> <ul style="list-style-type: none"><li>• Provided a fully integrated community development solution.</li><li>• Configured building permits and related reviews, workflows, inspections, and notifications.</li><li>• Configured development projects and related reviews, workflows, inspections, and notifications.</li><li>• Configured code enforcement from online complaints through inspection, violation, citation, abatement, and court.</li><li>• Configured request tracking to route and resolve requests submitted on the public portal.</li><li>• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.</li><li>• Configured multiple integrations and migrated data from a legacy system.</li><li>• Developed dozens of custom reports, custom metrics, and user dashboards.</li></ul>	
<b>Population:</b> 6,303	<b>Project Timeline:</b> Feb 2024 – Jun 2024



Reference 2: Angier, North Carolina	
<b>Contact Name:</b> Jeff Jones	<b>Contact Title:</b> Planning & Inspections Director
<b>Contact Phone:</b> 919-331-6702	<b>Contact Email:</b> jajones@angier.org
<b>Citizenserve Modules:</b> Permitting, Code Enforcement, Development Projects (in process), <a href="#">Online Portal</a> .	<b>Additional Services:</b> System Integration
<b>Overall Project Scope:</b> <ul style="list-style-type: none"> <li>• Provided a fully integrated community development solution.</li> <li>• Configured building permits and development projects and related reviews, workflows, inspections, and notifications.</li> <li>• Configured code enforcement from online complaints through inspection, violation, citation, abatement, and court.</li> <li>• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.</li> <li>• Configured multiple integrations.</li> <li>• Developed dozens of custom reports, custom metrics, and user dashboards.</li> </ul>	
<b>Population:</b> 7,283	<b>Project Timeline:</b> Apr 2024 – Jan 2025

Reference 3: Maryville, Illinois	
<b>Contact Name:</b> Ginny Fuhler	<b>Contact Title:</b> Deputy Clerk
<b>Contact Phone:</b> 618-345-7028 x2323	<b>Contact Email:</b> deputyclerks@maryville-il.us
<b>Citizenserve Modules:</b> Permitting, Planning & Zoning, Licensing, Code Enforcement, Request Tracking, <a href="#">Online Portal</a> .	<b>Additional Services:</b> System Integration, Data Migration
<b>Overall Project Scope:</b> <ul style="list-style-type: none"> <li>• Provided a fully integrated community development solution.</li> <li>• Configured building permits and planning &amp; zoning projects and related reviews, workflows, inspections, and notifications.</li> <li>• Configured licensing and renewals and related reviews, workflows, inspections, and notifications.</li> <li>• Configured code enforcement from online complaints through inspection, violation, citation, abatement, and court.</li> <li>• Configured request tracking to route and resolve requests submitted on the public portal.</li> <li>• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.</li> <li>• Configured multiple integrations and migrated data from a legacy system.</li> <li>• Developed dozens of custom reports, custom metrics, and user dashboards.</li> </ul>	
<b>Population:</b> 8,316	<b>Project Timeline:</b> Aug 2022 – Jun 2023

Reference 4: Wasilla, Alaska	
<b>Contact Name:</b> Charlie Seidl	<b>Contact Title:</b> Code Compliance Officer
<b>Contact Phone:</b> 907-352-5432	<b>Contact Email:</b> cseidl@cityofwasilla.gov
<b>Citizenserve Modules:</b> Permitting, Development Projects, Licensing, Code Enforcement, <a href="#">Online Portal</a> .	<b>Additional Services:</b> System Integration
<b>Overall Project Scope:</b> <ul style="list-style-type: none"> <li>• Provided a fully integrated community development solution.</li> <li>• Configured building permits and development projects and related reviews, workflows, inspections, and notifications.</li> <li>• Configured licensing and renewals for mobile food vendor and rental housing and related reviews, workflows, notifications.</li> <li>• Configured code enforcement from online complaints through inspection, violation, citation, abatement, and court.</li> <li>• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.</li> <li>• Configured multiple integrations.</li> <li>• Developed dozens of custom reports, custom metrics, and user dashboards.</li> </ul>	
<b>Population:</b> 9,945	<b>Project Timeline:</b> Nov 2021 – May 2022

Reference 5: Loxley, Alabama	
<b>Contact Name:</b> Arthur Johnson	<b>Contact Title:</b> Community Development Technician
<b>Contact Phone:</b> 251-923-3633	<b>Contact Email:</b> arthurj@cityofloxley.com
<b>Citizenserve Modules:</b> Permitting, Licensing, Code Enforcement, <a href="#">Online Portal</a> .	<b>Additional Services:</b> System Integration, Data Migration
<b>Overall Project Scope:</b> <ul style="list-style-type: none"> <li>• Provided a fully integrated community development solution.</li> <li>• Configured building permits and planning &amp; zoning projects and related reviews, workflows, inspections, and notifications.</li> <li>• Configured licensing and renewals and related reviews, workflows, inspections, and notifications.</li> <li>• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.</li> <li>• Configured multiple integrations and migrated data from a legacy system.</li> <li>• Developed dozens of custom reports, custom metrics, and user dashboards.</li> </ul>	
<b>Population:</b> 4,623	<b>Project Timeline:</b> May 2022 – Dec 2022



## Proposals For



Online CRM Solution for Online Permitting & Payment System

Submitted by: **Civos, Inc.**

Date: May 14, 2025

714 East Micheltorena Street

Santa Barbara, CA 93103

805-450-6605

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# 1. Executive Summary

We are pleased to submit our proposal in response to the Town of Freedom's Request for Proposal for an Online CRM Solution for Permitting and Payment. At Civos, we recognize the challenges and opportunities faced by smaller municipal teams, and we are excited to offer a modern, efficient, and resident-focused system designed to simplify operations and improve service delivery with limited staff resources.

Our solution, **Viva Civic**, is a cloud-based platform designed for municipalities of all sizes. It unifies permitting, licensing, customer service, and payment processing into one cohesive system that is both powerful and easy to use. While Viva Civic is equipped to handle the complex needs of larger jurisdictions, its intuitive design and flexible configuration make it equally effective for smaller teams like Freedom's—enabling your staff to streamline operations, automate routine tasks, and deliver better service with less effort.

With Viva Civic, residents and contractors can apply for building permits, business licenses, and zoning approvals online, track application statuses in real-time, upload plans and documents, make payments, and communicate directly with staff—all through a 24/7 public portal. The system also supports automated workflows, speech-to-text transcription for meeting minutes, and complaint reporting tools for public works or code-related issues.

Our platform is already trusted by thousands of active users across jurisdictions including Garden Grove, CA (6,460 users in Building and Engineering), Citrus Heights, CA (7,110 users in Building), and Norfolk, VA (8,300 users in Public Works). These communities benefit from Viva Civic's powerful automation, intuitive interface, and robust reporting tools, with Garden Grove alone averaging over 3,000 unique portal visits each month.

We invite the Town to explore Viva Civic's key capabilities through the following video demonstrations:

- **Customer Portal:** [vivacivic.com/customer-portal-video](https://vivacivic.com/customer-portal-video)
- **Staff Interface:** [vivacivic.com/staff-interface-video](https://vivacivic.com/staff-interface-video)
- **Workflow Automation:** [vivacivic.com/work-flow-automation](https://vivacivic.com/work-flow-automation)
- **GIS Integration:** [vivacivic.com/viva-civic-gis](https://vivacivic.com/viva-civic-gis)
- **Communication Tools:** [vivacivic.com/viva-civic-communication](https://vivacivic.com/viva-civic-communication)
- **Reporting Dashboards:** [vivacivic.com/software-dashboard](https://vivacivic.com/software-dashboard)

Viva Civic can be quickly configured to align with the Town's existing systems. It seamlessly integrates with financial software, supports payment gateways including Stripe (simply connect your Stripe account), and allows for future scalability as your community grows and your needs evolve.

Our team has deep experience working with municipalities of all sizes and is committed to delivering a fully functional system in under six months. We'll provide full training for your staff and residents, a robust implementation plan, and transparent pricing that includes a detailed 5-year total cost of ownership.

We appreciate the opportunity to partner with the Town of Freedom to help transform the way your government interacts with and serves the public. Should you have any questions or need further information, please don't hesitate to reach out to me directly at [massoud@vivacivic.com](mailto:massoud@vivacivic.com).

Thank you for your consideration. We look forward to the opportunity to support your goals.

Sincerely,

A handwritten signature in black ink, appearing to read 'Massoud Abolhoda', with a horizontal line drawn through it.

**Massoud Abolhoda**

President, Civos, Inc.

[massoud@vivacivic.com](mailto:massoud@vivacivic.com)

[www.vivacivic.com](http://www.vivacivic.com)

## 2. Proposed Solution Overview

The Town of Freedom has articulated a clear vision: modernize permitting, licensing, and payments through a unified platform that alleviates the burden on a small administrative team while enhancing service delivery to residents. Our proposed system, **Viva Civic**, directly addresses each of your stated objectives and offers the flexibility, automation, and scalability needed to meet your current needs and evolve with your community.

### 2.a Unified Permitting, Licensing, and CRM Platform

Viva Civic is a fully integrated, cloud-hosted system that consolidates **building permits, zoning approvals, business licenses, and code enforcement** workflows into a single user-friendly interface. It eliminates fragmented tools and manual processes by centralizing all interactions—submission, review, communication, approval, and payment—into one digital environment that is accessible 24/7.

Our system enables Freedom's Administrator, Clerk/Treasurer, and Deputy Clerk/Treasurer to work more efficiently by automating time-consuming tasks, such as routing applications, calculating fees, issuing alerts, and updating statuses. Each application type (building, zoning, licensing, etc.) is configurable with its own forms, review steps, fees, and approvals. Workflow logic ensures that no project advances until each department or agency completes its assigned tasks.

### 2.b Workflow Automation

Viva Civic's built-in **workflow engine** is a powerful tool that automates routine steps in the permitting and licensing process, reducing manual oversight and increasing consistency across departments. Workflows can be configured to reflect the Town of Freedom's real-world review and approval processes, including:

- **Parallel reviews** (e.g., simultaneous Planning and Building approvals)
- **Automated routing** based on permit type or project location
- **Milestone reminders and task assignments**
- **Configurable automated inspection scheduling** based on project phase or permit status

### 2.c Online Public Portal for 24/7 Access

The **Viva Civic Public Portal** is a highly flexible, self-service interface that can be configured to meet the needs of any jurisdiction—whether a growing town like Freedom or a large city. Its adaptable design ensures that municipalities can offer residents and contractors a seamless online experience that aligns with their processes and service expectations.

Through the portal, users can:

- Submit permit, license, and zoning applications.
- Upload all standard file formats including PDFs, CAD drawings, and images.

- Pay fees online using credit/debit cards or ACH.
- Track real-time status updates and review feedback.
- Communicate directly with staff via built-in messaging tools.
- Receive automated notifications for approvals, rejections, or required revisions.

The portal is accessible 24/7 from any device, ensuring that constituents can manage their applications and payments at their convenience—without relying on office hours or phone calls. For Freedom’s limited staff, this means fewer inbound inquiries and more time focused on processing and decision-making.

## 2.d Integrated Payment Processing

Viva Civic includes **seamless payment gateway integration**—currently Stripe, but compatible with others—to handle online payments securely. All payments are logged against projects with full transaction history, and integration with your **financial software** (via secure APIs) ensures proper reconciliation and transparency.

## 2.e Document and Plan Management

Applicants can upload and manage documents using a built-in document manager that accepts all standard file formats. Our platform includes **electronic plan review** capabilities using Apyrse, enabling your staff or outside reviewers to annotate, approve, or request corrections directly on digital files.

Additionally, the system maintains version history, audit trails, and allows team-based collaboration during plan review cycles—critical when managing subdivision or commercial projects with multiple disciplines involved.

## 2.f Additional Features Tailored to Your Needs

The Town of Freedom’s interest in extended features like meeting minute automation and resident reporting are already supported:

- **Speech-to-Text Transcription for Meetings:** While Viva Civic does not include native speech-to-text functionality, we offer this capability through seamless integration with trusted third-party transcription services such as Otter.ai, Zoom, Microsoft Teams, and Google Meet. These platforms allow meeting audio to be transcribed automatically, with searchable text and time-stamped dialogue, making it easy to generate and archive meeting minutes.

If your team already uses one of these tools, we can connect it to your Viva Civic environment to streamline the process. This approach allows you to maintain flexibility while still benefiting from automated meeting documentation.

- **Resident Issue Reporting:** Our optional public reporting module allows citizens to report code violations, nuisance complaints, or public works concerns from their mobile phone or browser—complete with photo attachments, location tagging, and status updates.

## 2.g Real-Time Dashboards and Reporting

Viva Civic’s **dashboards** offer dynamic insight into permit volumes, review timelines, inspection schedules, and revenue. Users can filter data by date, type, or status and export reports in Excel, PDF, or CSV formats for council presentations or audits.

## 2.h System Integrations and API Compatibility

To ensure your systems work together, Viva Civic is equipped with full **API compatibility** and ready-made connectors for:

- **Stripe** (or your preferred payment provider)
- **GIS systems** (such as CAI or Esri ArcGIS)
- **Financial software platforms** for ledger syncing and reporting

These integrations are configured during setup and validated during user acceptance testing to ensure a smooth go-live.

---

### Summary of Alignment with Freedom’s RFP Objectives

RFP Requirement	Viva Civic Solution
Building permits, zoning, business licenses	✓ Fully supported through configurable permit types
AI-driven workflow and public-facing chatbots	✓ Included; customizable for Freedom's use cases
Integrated online payments	✓ Stripe-ready with multiple gateway options
24/7 public portal	✓ Responsive design with full applicant functionality
Support for PDFs, CAD, image files	✓ Robust document upload and markup capabilities
Meeting minutes and speech-to-text	✓ Optional AI transcription module
Public concern/complaint reporting	✓ Optional resident reporting module
Real-time dashboards	✓ Configurable staff dashboards and reporting tools
Financial system integration	✓ API-based connections for seamless syncing

### 3. Implementation Timeline

Civos understands that the **Town of Freedom** is looking for a smooth, low-disruption implementation of a modern permitting, licensing, and payment system—especially given your limited staff resources and lack of an existing online solution. Our team has successfully deployed Viva Civic in similarly sized communities and has developed an approach that delivers a fully functioning, public-facing system **within six months or less**.

#### i) Project Management Approach

Civos will assign a **dedicated Project Manager** to guide the Town of Freedom through every stage of implementation—from initial configuration through post-go-live support. Our approach emphasizes collaboration, speed, and ease of adoption for small teams.

We follow a structured, **phased deployment plan** supported by four progressive environments to ensure stability and eliminate risk:

- **Customization/Development Server** – Where our engineers adapt Viva Civic to meet Freedom’s needs and map your workflows and permit types.
- **Integration Environment** – A secure test zone where we validate system-wide features including payment gateways and GIS connections.
- **Staging Environment** – A safe sandbox where Freedom staff will interact with the system, test real scenarios, and confirm readiness.
- **Production Environment** – The live environment that launches only after testing is complete and all data has been migrated and verified.

This structured approach guarantees data integrity, minimizes downtime, and ensures staff have full confidence before going live.

---

#### ii) Agile Deployment: Enabling Process Optimization

Our **Agile deployment method** is designed not only to implement software, but to improve your existing processes. Since the Town currently lacks a digital system, we will work with your team to transform paper-based or manual workflows into efficient, trackable digital processes.

##### Key Benefits:

- **Iterative Feedback Loops** – Your team will be involved at every step to test and refine the system in real-time.
- **Custom Workflow Modeling** – Permit workflows will reflect how Freedom operates today and allow for future changes without custom coding.
- **Efficiency Gains** – We’ll help identify ways to reduce manual entry, eliminate duplicate effort, and increase turnaround speed.

- **Built-in Adaptability** – Freedom staff will have full administrative control to modify forms, fees, and templates after go-live without needing outside help.

### iii) Testing and Quality Assurance

To ensure a successful launch, Civos applies a rigorous testing strategy:

- **Unit Testing** – Conducted by our team during form configuration and workflow setup.
- **Integration Testing** – Verifies that Viva Civic works smoothly with payment processors (e.g., Stripe), GIS systems, and any financial tools.
- **User Acceptance Testing (UAT)** – Town staff will test the entire system using real scenarios in the staging environment and provide feedback.
- **Final Validation** – Post-UAT, we perform a final QA sweep to ensure everything is production-ready.

## 3.1 Turn-Key Implementation Phases and Timeline

Our standard 24-week implementation plan is structured into eight manageable phases. The schedule is flexible to accommodate Freedom’s availability and staffing levels.

Phase	Description	Duration
1	Project Kickoff & Planning	2 Weeks
2	Requirements Gathering, Setup & Configuration	6 Weeks
3	User Acceptance Testing (UAT)	4 Weeks (concurrent with Phase 4)
4	Integration & Refinement (GIS, Stripe, Financial)	Concurrent with Phase 3
5	Final Testing & Adjustments	4 Weeks
6	Report Setup (Dashboards, Exports)	Concurrent with Phase 5
7	Staff Training	2 Weeks
8	Go-Live and Post-Support	4 Weeks
<b>Total Duration:</b> Approximately 22 Weeks		

We have also completed full implementations in as little as 16 to 18 weeks when needed, and we can accelerate the proposed timeline if the Town prefers a faster deployment.

#### Sample Milestones and Deliverables

- **Phase 1:** Signed Project Plan, Communication Protocols
- **Phase 2:** Configured Staging Site, Early Workflow Setup
- **Phase 3–4:** Staff Testing Feedback, Validated Integrations
- **Phase 5–6:** Final QA, Reporting Suite Completed
- **Phase 7:** Staff Fully Trained with Access to Manuals and Videos
- **Phase 8:** Go-Live, Hypercare Support, Transition to Ongoing Helpdesk

### 3.2 Implementation Deliverables

Civos will deliver the following throughout the project:

- Configured Viva Civic system tailored to Freedom's permits, licenses, workflows, and settings.
- Data migration and configuration documentation (as applicable).
- Training materials (manuals, job aids, recorded video guides).
- Integration documentation (Stripe, GIS, and financial system).
- A final Go-Live Checklist to ensure readiness.
- A 30-day post-go-live support and monitoring plan.

### 3.3 Town Responsibilities

To ensure a smooth launch, we respectfully request the following support from Freedom:

- Assignment of a staff liaison for coordination and feedback.
- Availability for brief milestone meetings and training.
- Access to existing digital forms, fee tables, and any GIS data or account credentials.
- Participation in User Acceptance Testing and Go-Live signoff.

### Our Commitment to Freedom

We understand that your small staff has a big mission—and limited time to spend configuring software. Our job is to make this transition simple, empowering, and fast. From kickoff to go-live, we'll guide you every step of the way and ensure the system is not only live, but loved—by both your team and your community.



## 4. Training and Education Plan

At Civos, we understand that the Town of Freedom operates with a lean team and limited time. That's why we've simplified our training approach to match your needs—practical, minimal, and focused entirely on the essentials.

### *a) Simplified Training Plan*

With only three core staff and no legacy system to transition from, we'll focus on the few key tasks you'll be performing daily. Our goal is to get you comfortable and confident with minimal disruption.

Phase	Audience	Focus
<b>Staff Orientation &amp; Use</b>	All user	Submitting, reviewing, and processing permit applications, managing inspections, and processing payments
<b>System Test Drive</b>	All users	Hands-on use of your configured system before go-live—so you can test real scenarios and workflows
<b>Follow-up Coaching</b>	TBD	Troubleshooting, Q&A, and usage tips once you're live, to build comfort and confidence over time

We handle all the technical setup, customization, and ongoing configuration updates—so you don't have to.

### *d) Long-Term Support*

Even if team members change, you're covered:

- **All training is recorded**
- **Self-paced modules** available anytime
- **Refresher sessions** on request (no added cost)

### Built for Simplicity

Your team doesn't need to become system administrators. You just need a simple tool that works—and support that's there when you need it. We'll take care of the rest so you can stay focused on serving Freedom's community.

## 5. Project Budget

Civos is committed to delivering a full-featured, affordable permitting and payment system to the **Town of Freedom**—one that includes everything needed to modernize your operations with **no hidden fees**, **no per-user costs**, and **ongoing support included**. Below is the detailed cost structure for your Viva Civic implementation.


### 5.1 One-Time Implementation Costs

Item	Cost
Software Configuration (Permitting, Zoning, Licensing, Payment Portal)	Included
System Setup and Staging Environment	Included
GIS Integration	Included
Stripe Payment System Integration	Included
Project Management	Included
User Acceptance Testing (UAT) Support	Included
End-User Training (Virtual)	Included
Go-Live Assistance and 30-Day Hypercare	Included
Documentation and Training Resources	Included

 **Total One-Time Implementation Cost: \$20,000.00**

### 5.2 Annual Software Licensing, Support, and Hosting

Item	Annual Cost
Software Licensing (Unlimited Staff and Resident Users)	Included
Secure Cloud Hosting (AWS Environment)	Included
System Updates and Feature Enhancements	Included
Help Desk and Ticketing Support	Included
Access to Training Library and Knowledge Base	Included

 **Annual Software Maintenance & Support Fee: \$18,000.00/year payable**  
*(Subject to standard 5% annual inflation adjustment after Year 2)*

### Key Pricing Notes

- **No Per-User Fees:** Unlimited internal and public users—Freedom can grow without additional licensing costs.
- **All Core Features Included:** Permitting, payments, document uploads, inspection scheduling, status tracking, GIS mapping, and public portal.
- **Designed to Scale:** Add modules or users in the future without requiring costly system rework.
- **No Hidden Costs:** All setup, hosting, training, and support services are bundled into the quoted fees.

---

### 5.3 Optional Services

Optional Item	Cost
Additional Modules (e.g., Meeting Minutes, Public Works Requests)	\$15,000 per module
Onsite Training (in addition to virtual sessions)	\$1,000/day + travel
Custom Report Development (beyond standard suite)	Quoted per scope

---

### 5-Year Total Cost of Ownership

Year	Annual Fee	Cumulative Cost
Year 1	\$20,000 (Setup) + \$16,000	\$36,000
Year 2	\$16,800	\$52,800
Year 3	\$17,640	\$70,440
Year 4	\$18,522	\$88,962
Year 5	\$19,500	\$108,462


**Total 5-Year Cost of Ownership: \$108,462.00**

## 6. References

### City of Garden Grove, California

**Contact:**

David Dent, Chief Building Official, Assistant Director

 (714) 741-5343


 ddent@ci.garden-grove.ca.us


---

### City of Citrus Heights, California

**Contact:**

Mike Pettinato, Senior Database and Application Analyst

 (916) 727-4727


 mpettinato@citrusheights.net


---

### City of Norfolk, Virginia

**Contact:**

Freda Burns, Right-of-Way Administrator

 (757) 637-3744

 freda.burns@norfolk.gov

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## 7. Maintenance and Support

Civos is committed to providing the **Town of Freedom** with responsive, hands-on support long after Viva Civic is live. We view this not as a one-time implementation—but an ongoing partnership. Our goal is to keep your system secure, up-to-date, and simple to manage, while giving your staff easy access to help whenever it's needed.

---

### A) Customer Support Services

#### Help Desk Access

Freedom staff will have direct access to our U.S.-based support team through:

- An in-app **email ticketing system**, built directly into Viva Civic
- A dedicated **support phone line** during business hours
- A **24/7 emergency line** for urgent Level 1 issues (e.g., service outage)

#### Ticketing and Issue Tracking

Support requests are managed through a transparent ticketing system. You'll receive email updates at each stage—from submission to resolution—with a clear history of all correspondence.

#### Self-Service Knowledge Base

Your team can access an always-available support portal that includes:

- FAQs and “How-To” articles
- Troubleshooting guides
- Quick-reference walkthroughs
- Short training videos for common tasks

#### In-Form Help Prompts

To minimize confusion, helpful instructions and tooltips are embedded directly within Viva Civic's forms and workflows. These guides reduce the need for staff to contact support for everyday tasks.

---

## B) Service Level Agreement (SLA)

Issue Severity	Initial Response Time	Resolution Target
<b>Level 1 – Critical Outage</b>	2 hours	24 hours
<b>Level 2 – Major System Impact</b>	4 business hours	2 business days
<b>Level 3 – Minor Issue or Usability Question</b>	1 business day	10 business days
<b>Level 4 – Feature or Enhancement Request</b>	Within 3 business days	Scheduled or added to roadmap

All requests are tracked in our support system with full visibility and status updates available to Town staff.

---

## C) System Maintenance and Upgrades

- **Quarterly Updates:** New features, bug fixes, and security patches are deployed on a regular schedule at no extra cost.
- **Cloud-Based Deployment:** System updates are rolled out automatically to all users during off-peak hours to avoid disruptions.
- **Advance Notifications:** For any significant update, we provide release notes and advance notice so you're never caught off guard.

---

## D) Post-Go-Live Support Commitment

### First 30 Days: Hypercare Support

- Daily availability to resolve early issues or adjust workflows
- Weekly check-ins with your team to ensure everything is running smoothly

### Quarterly Check-Ins

- A dedicated Civos team member will meet with Freedom staff each quarter to:
  - Review usage trends and address new challenges
  - Offer optimization tips or explore new features

- Identify future needs or optional modules

### Feedback Loop

- Your team can suggest improvements and enhancements, which may be added to future product updates. Freedom will have a voice in how Viva Civic evolves.

---

### Our Commitment to Freedom

We don't just deliver software—we deliver support. From the first day of implementation to long after go-live, we'll be here to ensure that **Freedom's staff remains confident, capable, and fully supported**, with a system that grows and adapts as your community evolve.

## Appendix A:

### Detailed Features Common to All Modules

#### A.1 Customer Portals:

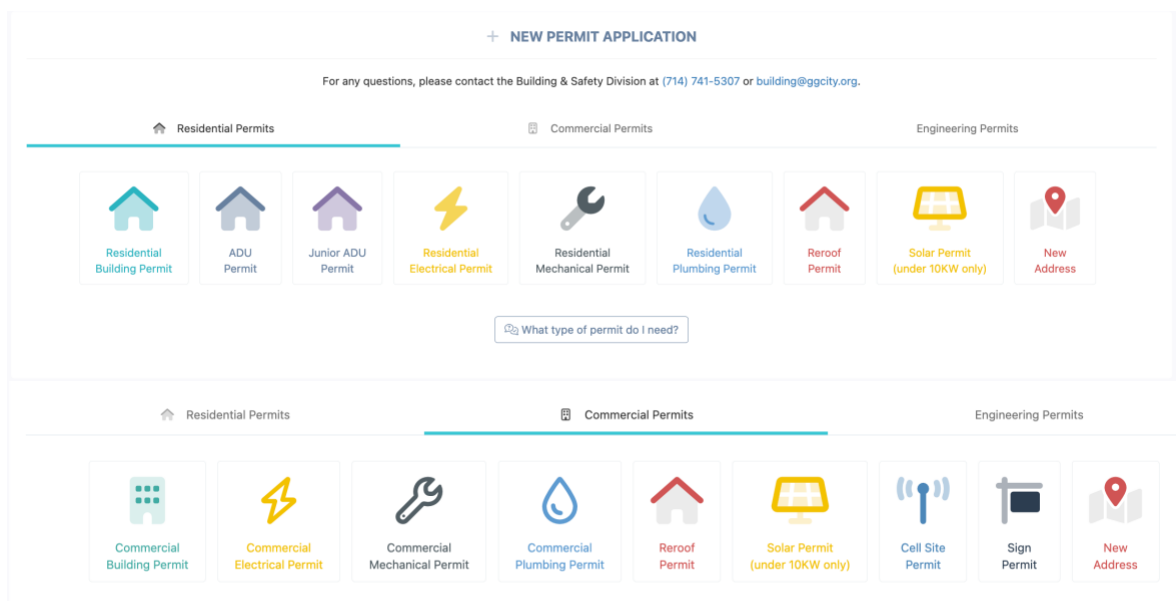
The Viva Civic customer portal is extremely user-friendly and empowers City customers to submit their applications and conduct their entire permitting process online. This includes online inspection requests, access to status updates and corrections, and online payments. Customers can access all this information from their smartphones due to our responsive design.

Viva Civic features intuitive interfaces and a straightforward design that simplifies the application submission process.

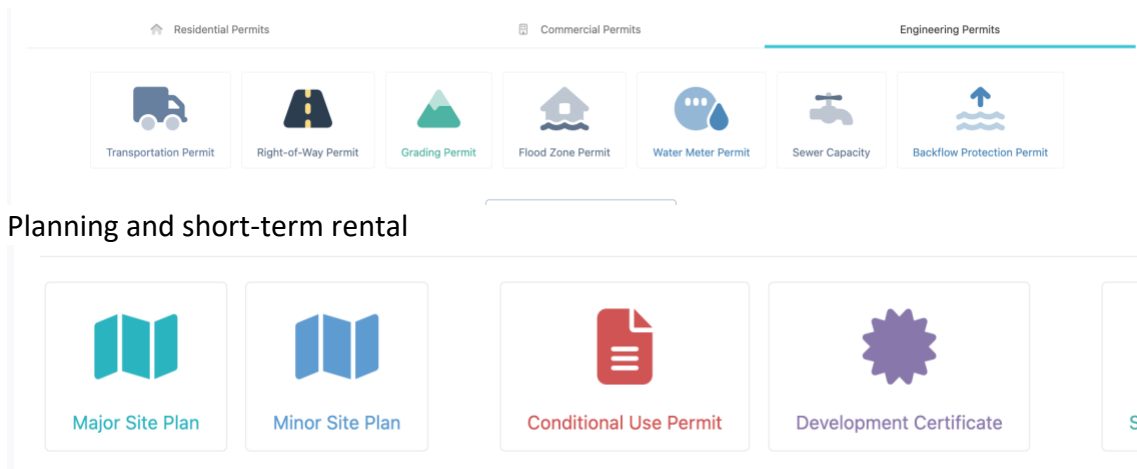
Please see our video at <https://www.vivacivic.com/customer-portal-video/>

The following section highlights some of the key features of the Viva Civic Customer Portal.

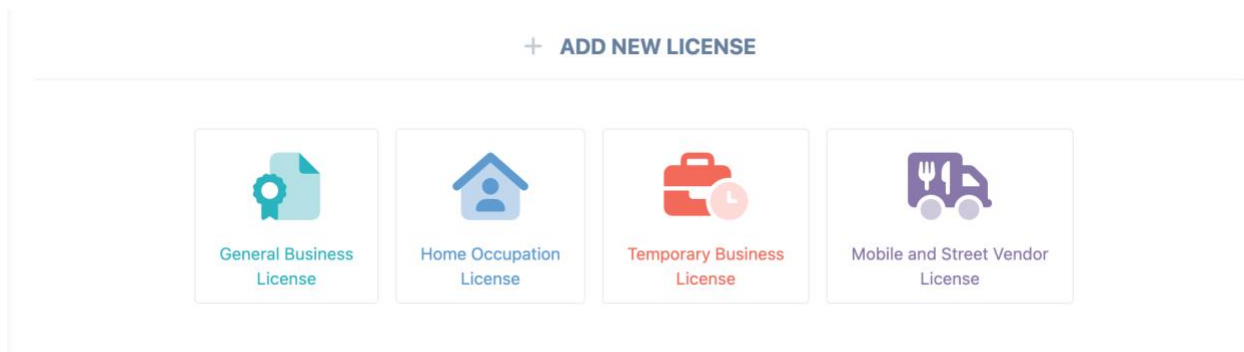
**Permit Specific Application Type:** Each permit type, has its own specific application interface and workflow, this keeps data entry focused on the type of permit requested, reduces data entry time, automates project assignment through multi-agency review to completion of project. Each application comes with modern and crisp interface.







## Business Licensing



### AI Assistant:

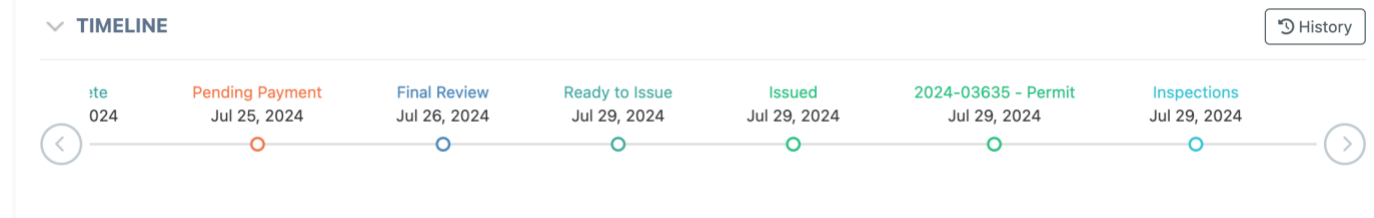
At Civos, we are committed to utilizing AI in meaningful ways to facilitate permitting and assist users. Currently, we have deployed an AI assistant in the City of Garden Grove. This assistant helps customers by understanding the scope of their work and informing them about the type of permit they need.

**Fee Estimate:** Viva Civic can be configured to provide fee estimates based on the project scope of work and the Town of Freedom's fee schedule.

**Ease of Data Entry:** Through the use of radio buttons, dropdown lists, calendars, and autofill features, we simplify data entry and improve data accuracy. Fields are clearly identified as optional or required, ensuring users can easily navigate the form and provide the necessary information accurately.

**Project Timeline:** Every major action on the project is shown in the project timeline history. Customers can scroll left and right to see all actions on the project since its inception, each with

a timestamp.



**Address Verification:** The Viva Civic Portal automatically verifies addresses against the Town of Freedom's address database, ensuring accurate location information for each project.

**GIS Integration:** Viva Civic enables customers and staff to initiate projects by selecting a parcel or address, dropping a pin, or drawing a shape to define the project's scope. See the GIS section for further details.

**A/E/C & Owner Collaboration:** Viva Civic fosters collaboration among architects, engineers, and construction teams by linking users through their associated email addresses. This integrated ecosystem allows design, construction, and owner teams to collaborate seamlessly. Teams can view, track, and monitor project status through review, approval, and inspection stages.

Projects > Add Commercial Building Permit

### Add Commercial Building Permit

#### DETAILS

##### OVERVIEW

Project Address: Please select the address (req... +)

Assessor's Parcel Number (APN): (optional)

Work Type: Please select a work type (required) ▼

Project Description: (required)

Project Valuation: \$ (required)  
Please enter the project valuation as a number without a thousands separator.

Note: (optional)

##### CONTACTS

Applicants: Please select the applicants (r... +)

Property Owner(s): Please select the owner (requir... +)

Contractors: Please select the contractor (o... +)

Architects: Please select the architect (op... +)

Engineers: Please select the engineer (opt... +)

Designers: Please select the designer (opt... +)

##### COMMERCIAL APPLICATION

Code Enforcement Case: ☐ Yes ☐ No  
Is this a code enforcement case?

Change of Use: ☐ Yes ☐ No  
Is this a change of use?

Existing use: (optional)  
If this is a change of use, please enter the existing use.

Proposed use: (optional)  
If this is a change of use, please enter the proposed use.

Occupancy Group: ☐ A ☐ B ☐ E ☐ F ☐ H  
☐ I ☐ L ☐ M ☐ R ☐ R-3  
☐ S ☐ U

Construction Type: Please select a construction type ▼

Existing Square Footage: (required) sq. ft.

Proposed Square Footage: If applicable (optional) sq. ft.

Number of units: If any (optional) unit(s)

Sample application

Projects > A-305078

2024-00015 / A-305078 - Residential Building Permit / Addition / 12636 Main St

OVERVIEW

PERMIT ISSUED

Permit 2024-00015 has been issued on March 21, 2024 and will expire on March 21, 2025.

View Permit

INSPECTIONS

The latest inspection was marked as Corrections Required. You can view more information on your inspections below.

View InspectionsSchedule Inspection

TIMELINE

Plan CheckMar 21, 2024Correction IssuedMar 21, 2024Plan CheckMar 21, 2024Final ReviewMar 21, 2024Ready to IssueMar 21, 2024IssuedMar 21, 20242024-00015 - PermitMar 21, 2024

NOTES

M

Massoud AbolhodaMarch 21, 2024 10:34 AM

Nice to meet you

INSPECTIONS

	INSPECTOR	DATE	TIME FRAME	ATTACHMENTS	STATUS
Foundation	Mehrdad Maghsoodloo	Mar 22, 2024	-	-	Scheduled
Foundation	Mehrdad Maghsoodloo	Mar 22, 2024	-	-	Corrections Required

DETAILS

BILLING

\$8,026.20

INVOICED

\$8,026.20

PAID

\$0.00

BALANCE

INVOICES

Invoice 74754

\$3,230.40

Paid

Massoud H Abolhoda

Mar 21, 2024

Mar 21, 2024

Mar 21, 2024

Invoice 74753

\$4,795.80

Paid

Massoud H Abolhoda

Mar 21, 2024

Mar 21, 2024

Mar 21, 2024

INITIAL APPLICATION REVIEWS

PLAN CHECKS

	ASSIGNED TO	CREATED ON	DUE ON	COMPLETED ON	ATTACHMENTS	STATUS
Cycle 2	-	Mar 21, 2024	-	Mar 21, 2024	Storm Water Control Plan T1.pdf	Approved
Building	-	Mar 21, 2024	-	Mar 21, 2024	-	Approved
Cycle 1	-	Mar 21, 2024	-	Mar 21, 2024	23BDP-00741 Plans.pdf	Correction Issued
Building	-	Mar 21, 2024	-	Mar 21, 2024	-	Correction Issued

Project Status and Step-by-Step Guidance in Review and Approval Process

Project timeline

Built-in Communication Notes: Enables direct communication

Full Access to Inspections and Corrections

Project Fees and Invoice History

Full Access to Plan Checks and Corrections

Customer Portal Project Hub: serves as a centralized location for all essential project information

**Online Payments:** Viva Civic provides an easy and secure online payment interface. The system is integrated with Stripe for online payments, and we can provide integration with other desired online payment systems selected by the Town of Freedom.

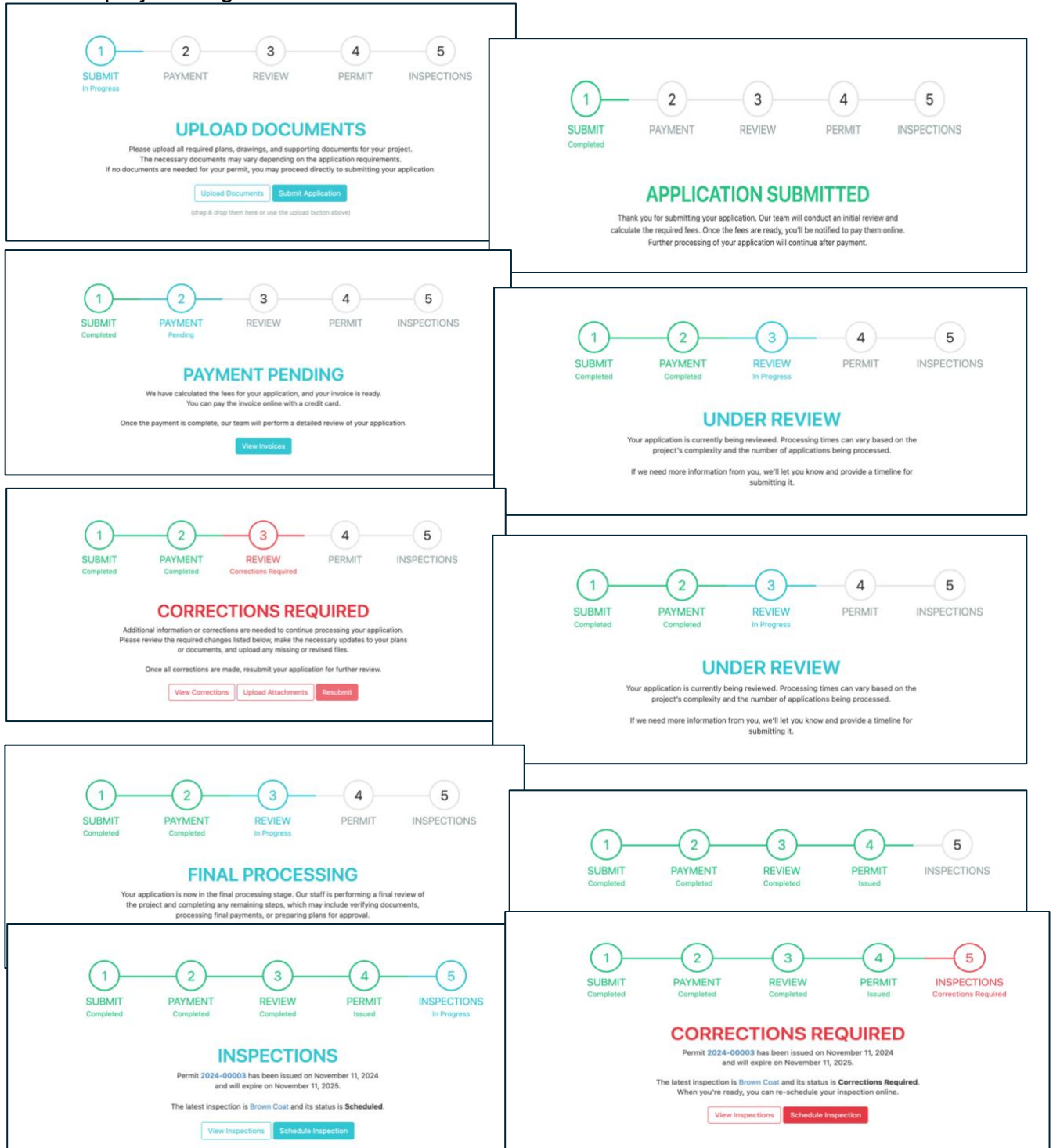
The screenshot shows the 'Add Credit Card Payment' form. At the top, the breadcrumb is 'Projects > R-000074 > Add Credit Card Payment'. The form title is 'Add Credit Card Payment'. Under the 'DETAILS' section, there are fields for 'Received From' (Massoud H Abolhoda), 'Amount' (350.00), and a note 'A total of \$350.00 is outstanding on invoice 74750'. There is also a 'Card' section with a 'Card number' field and a 'MM / YY CVC' field. A 'Note' field is optional. At the bottom right, there is a green 'Add Payment' button.

**Access to all past and current projects:** From the home page of the customer portal, the user has access to all their past and current projects, all color-coded based on status. With one click, they can access a detailed overview of the software, providing more specific information on each project.

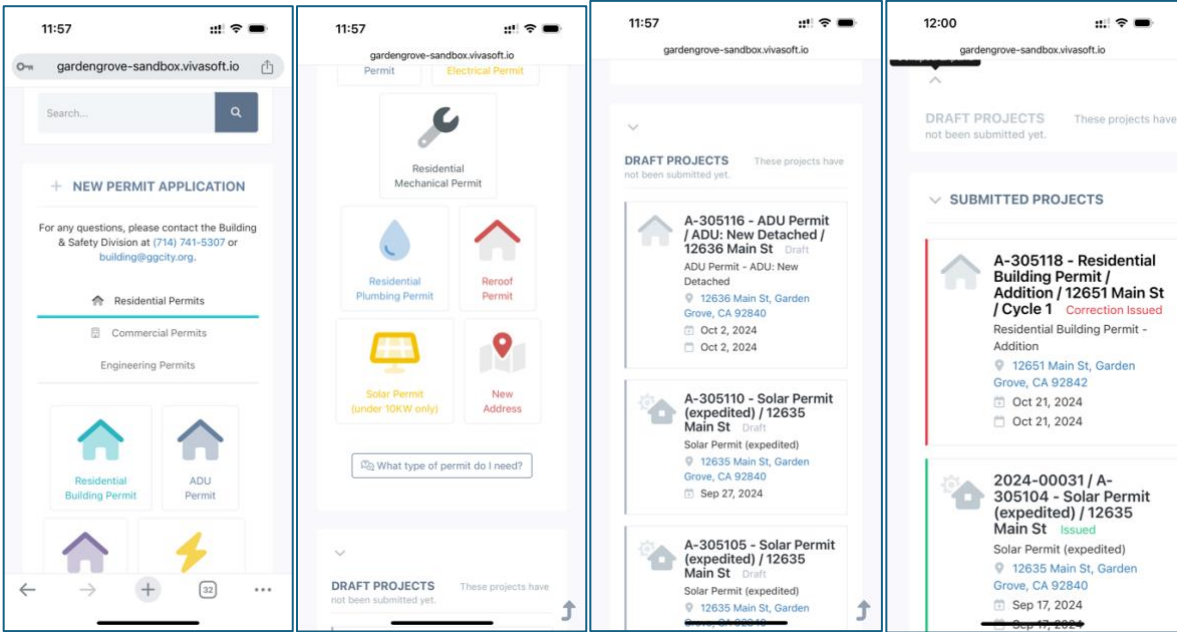
	<b>R-000074 - Test / 12635 Main St</b> Pending Payment	
	Right-of-Way Permit	12635 Main St, Garden Grove, CA 92840
	Massoud Abolhoda	Nov 15, 2023
		Feb 8, 2024
	<b>2023-13255 / A-305054 - Residential Building Permit / Alteration / 12271 Oakwood St</b> Inspections	
	Residential Building Permit - Alteration	12271 Oakwood St, Garden Grove, CA 92840
		Nov 2, 2023
		Nov 2, 2023
	<b>2024-00004 / A-305053 - Residential Building Permit / Addition / 12671 Main St</b> Issued	
	Residential Building Permit - Addition	12671 Main St, Garden Grove, CA 92840
		Oct 30, 2023
		Jan 25, 2024
	<b>2023-13254 / A-305052 - Residential Building Permit / New Multi Family Residence / 12635 Main St</b> Issued	
	Residential Building Permit - New Multi Family Residence	12635 Main St, Garden Grove, CA 92840
		Oct 26, 2023
		Oct 26, 2023
	<b>A-305051 - Residential Building Permit / Addition / 12652 Main St / Cycle 1</b> Correction Issued	
	Residential Building Permit - Addition	12652 Main St, Garden Grove, CA 92840
		Oct 26, 2023
		Dec 2, 2023
	<b>A-305050 - Residential Building Permit / Remodel / 12291 Oakwood St</b> Ready to Issue	
	Residential Building Permit - Remodel	12291 Oakwood St, Garden Grove, CA 92840
		Oct 19, 2023
		Oct 19, 2023

Partial View of Customer Home Page Showing Customer's Projects

**Project Status Dashboard (Please see next page)** The Project Overview page (Project Hub) on the Viva Civic Portal provides a clear view of project steps and upcoming actions. This feature helps guide customers, showing them exactly where they are in the process and what to expect next. Below are screenshots of the dashboard displaying different project stages.



Sample screenshots of Customer Portal on Mobile Phone



Sample screenshots of the Application Intake on Mobile Phone:

The image displays four sequential screenshots of a mobile application interface for adding a residential building permit. The app is titled 'GARDEN GROVE' and the URL is 'gardengrove-sandbox.vivasoft.io'.

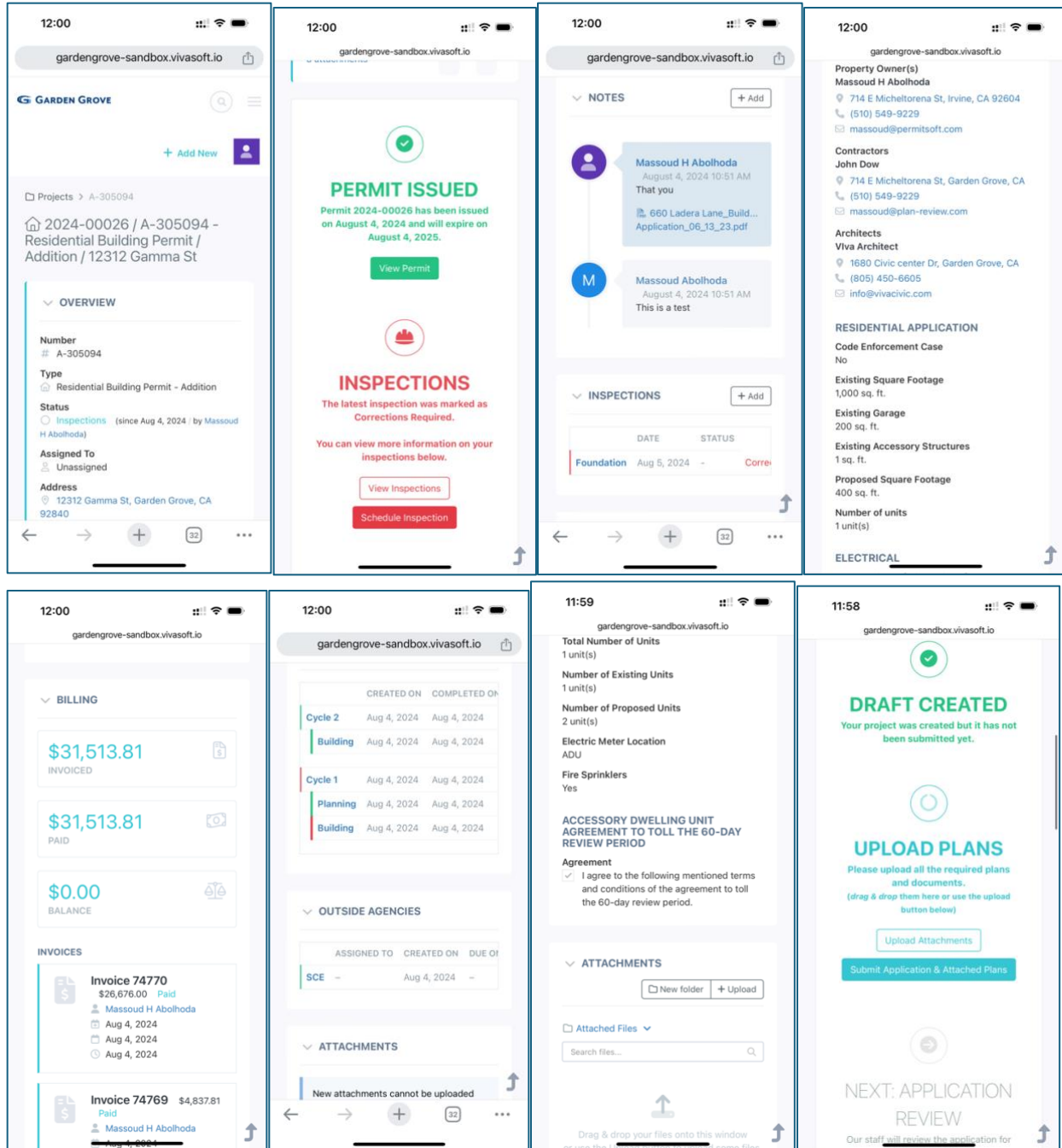
**Screenshot 1 (11:58):** Shows the 'Add Residential Building Permit' screen. It includes a 'DETAILS' section with fields for 'Project Address' (required), 'Assessor's Parcel Number (APN)' (optional), 'Work Type' (required), and 'Project Description'. A 'Create Residential Building Permit' button is visible at the bottom.

**Screenshot 2 (12:24):** Shows the 'CONTACTS' section. It includes a 'Note' field (optional) and a list of roles: 'Applicants', 'Property Owner(s)', 'Contractors', 'Architects', 'Engineers', and 'Designers'. Each role has a dropdown menu to select a contact and a '+' button to add a new contact.

**Screenshot 3 (11:58):** Shows the 'RESIDENTIAL APPLICATION' section. It includes a 'Code Enforcement Case' section with 'Yes' and 'No' radio buttons, and a 'Is this a code enforcement case?' question. Below this are fields for 'Existing Square Footage' (required), 'Existing Garage' (required), 'Existing Accessory Structures' (required), 'Proposed Square Footage' (if applicable, optional), 'Number of units' (if any, optional), and 'ELECTRICAL' section with 'Receptacle, Switch, Outlet, Fixture' (optional) and 'Service Panel, Sub Panel' (optional) fields.

**Screenshot 4 (12:24):** Shows the 'MECHANICAL' section. It includes fields for 'Equipment/Appliance(s)' (optional, each), 'Furnace/Wall Heater/AC/Exhaust/Water Heater', 'Ducting' (optional, ft.), 'PLUMBING' section with 'Fixtures, vents and piping' (optional, each), 'Equipment/Appliance(s)' (optional, each), 'Building Sewer' (optional, ft.), and 'Water Lateral' (optional, ft.). A 'Create Residential Building Permit' button is at the bottom.

Sample screenshots of the Project Overview Page on Mobile Phone





A.2 Staff Interface:

Project Home Page: Building

The screenshot displays the Viva Civic Project Home Page. The interface includes a left sidebar with navigation links, a top search bar, a main dashboard with project status tiles, and a bottom section for adding new applications.

**Callouts:**

- Access to Review, Inspection, GIS:** Points to the 'Reviews', 'Inspection', and 'Map' links in the left sidebar.
- Main Dashboard, one click access to projects in:** Points to the main dashboard area containing various project status tiles.
- Admin and report tools:** Points to the 'MANAGE' and 'REPORTS' sections in the left sidebar.
- Add a new project:** Points to the 'ADD NEW APPLICATION' section at the bottom.

**Project Status Tiles:**

Status	Count
Received	8
In Application Review	92
Complete	390
Denied	117
Payment Pending	155
In Plan Check	192
In Final Review	167
Documents Required	47
Approved (Plan Routing)	1179
Ready to Issue	10
Issued	1184
In Inspections	814
Finalized	1588
Expired	0

**ADD NEW APPLICATION**

**Residential Permits:**

- Residential Building Permit
- ADU Permit
- Junior ADU Permit
- Reroof Permit

**Commercial Permits:**

- Residential Electrical Permit
- Solar Permit

**Engineering Permits:**

- Residential Mechanical Permit
- Residential Plumbing Permit
- New Address

**MANAGE:**

- Contacts
- Users
- Citizens

**REPORTS:**

- All Reports

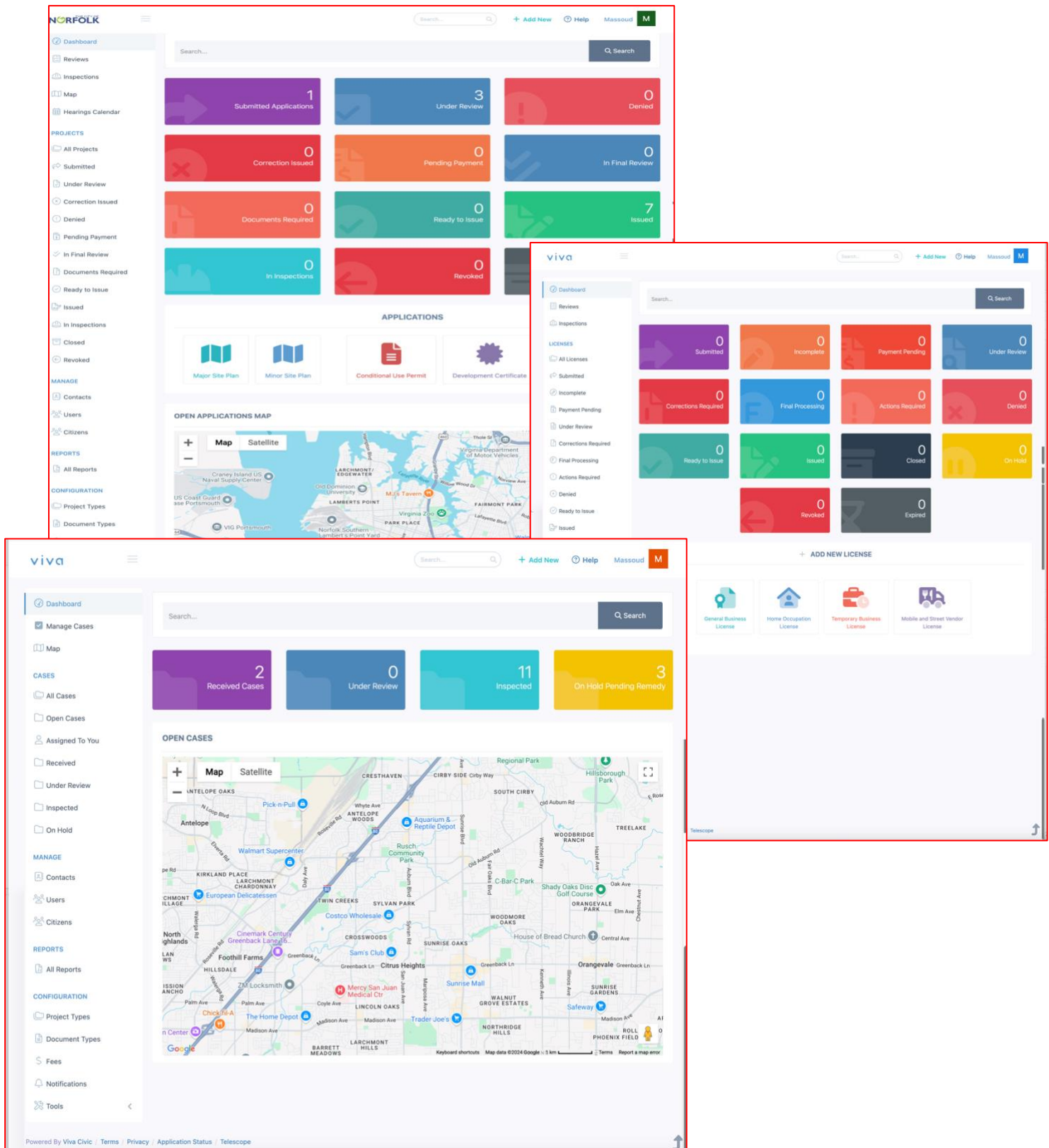
**CONFIGURATION:**

- Project Types
- Document Types
- Fees
- Notifications
- Tools

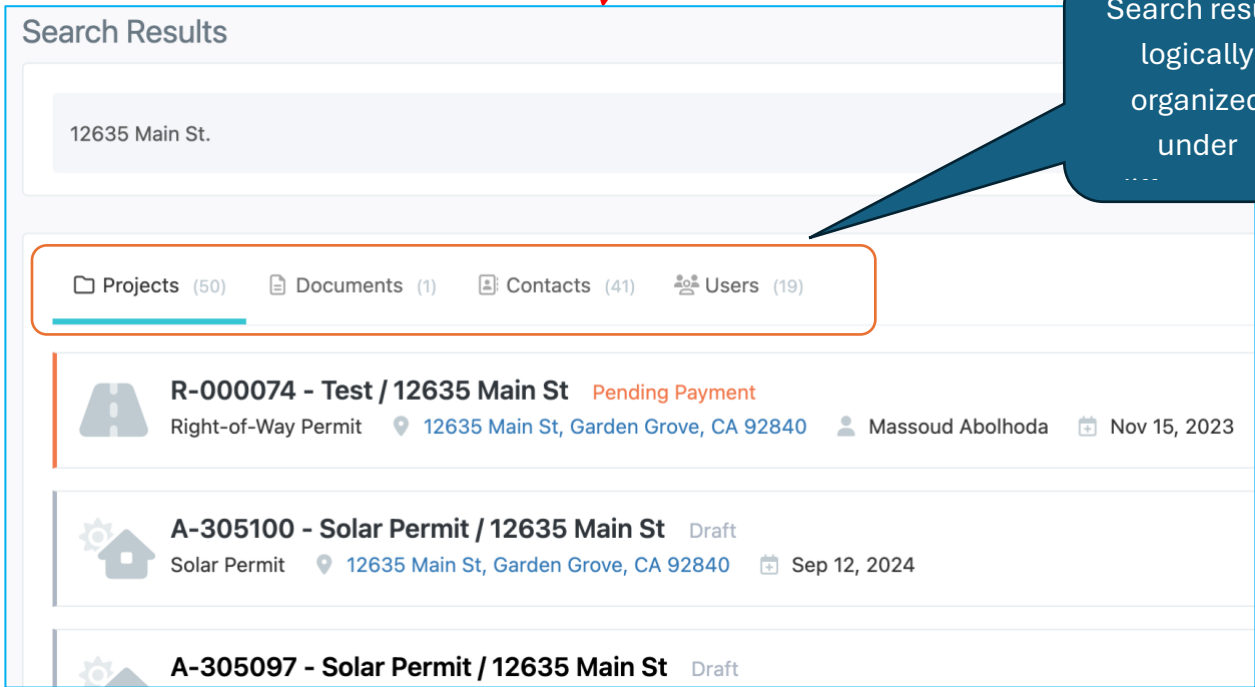
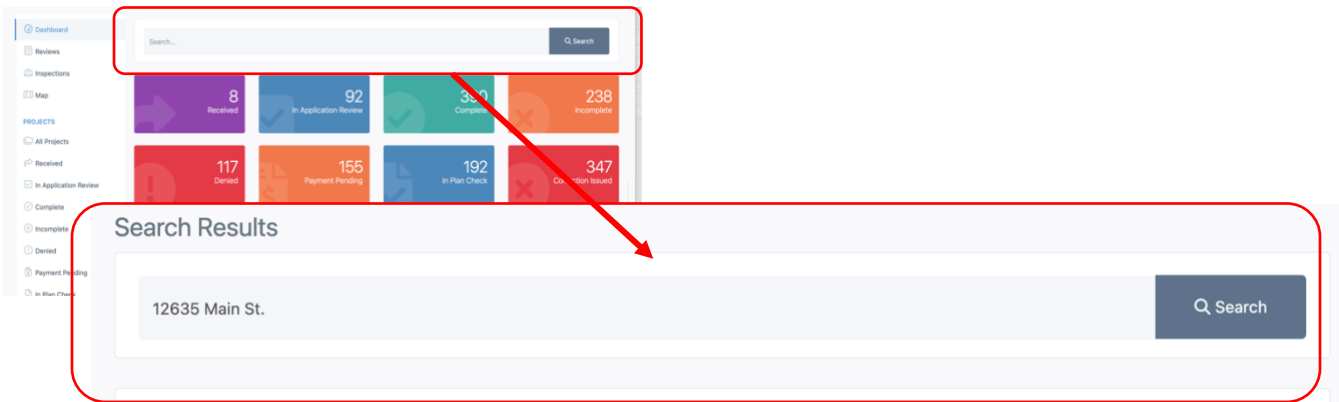
Powered By Viva Civic / Terms / Privacy / Application Status / Telescope



Staff Home Planning, Code Enforcement, Business Licensing



Powerful Search:



**Query tools:** Enables comprehensive searching and filtering of projects for quick access to relevant information. One Click access to project in various status. Plus ability to filter by

The screenshot displays the Viva Civic web application interface. The top navigation bar includes the 'GARDEN GROVE' logo, a search bar, and links for '+ Add New', '? Help', and 'Massoud M'. The left sidebar contains a navigation menu with options: Dashboard, Reviews, Inspections, Map, PROJECTS, All Projects, Received, In Application Review, Complete, Incomplete, and Denied.

The main content area shows a list of projects under the heading 'CORRECTION ISSUED' (Showing 1 to 50 of 347). The list includes the following projects:

- A-305118 - Residential Building Permit / Addition / 12651 Main St / Cycle 1** (Correction Issued) - Residential Building Permit - Addition, 12651 Main St, Garden Grove, CA 92842, Oct 21, 2024.
- A-305107 - Solar Permit (r) / 12636 Main St / Cycle 1** (Correction Issued) - Solar Permit (r), 12636 Main St, Garden Grove, CA 92840, Sep 26, 2024.
- A-305051 - Residential Building Permit / Addition / 12652 Main St / Cycle 1** (Correction Issued) - Residential Building Permit - Addition, 12652 Main St, Garden Grove, CA 92840, Oct 26, 2023.
- A-305041 - JADU Permit / 6511 Amy Ave / Cycle 2** (Correction Issued) - JADU Permit, 6511 Amy Ave, Garden Grove, CA 92845, Sep 17, 2023.
- Commercial Building Permit / Tenant Improvement / 12942 Galway St / Cycle 1** (Correction Issued) - Commercial Building Permit - Tenant Improvement, 12942 Galway St, Garden Grove, CA 92841, Sep 11, 2023.

Below the main list, there are two inset windows showing filter options:

- Filter By Type:** A list of project types with checkboxes, including ADU Permit, Commercial Building Permit, Commercial Electrical Permit, Commercial Mechanical Permit, Grading Permit, JADU Permit, Plan Routing Project, Residential Building Permit, Residential Electrical Permit, Residential Mechanical Permit, Residential Plumbing Permit, Sign Permit, and Solar Permit (r). The 'Apply Filter' button is at the bottom.
- Filter By Work Type:** A dropdown menu showing a list of work types, including Any, ADU: Conversion Attached, ADU: Conversion Detached, ADU: New Attached, ADU: New Detached, Addition, Addition/Remodel, Alteration, Code Enforcement - Alterations, Code Enforcement - As Built Additions, Code Enforcement - Remodel, Commercial: Alteration, Commercial: Cell Site, Commercial: Code Enforcement - Alterations, Commercial: Code Enforcement - As Built Additions, Commercial: Demo, Commercial: Fire Sprinklers, Commercial: High Pile Storage, Commercial: Masonry Fence, and Commercial: Miscellaneous.

**Review Management:** The powerful review dashboard enables streamlined project management for multi-agency reviews, featuring automated assignment and advanced filtering options for efficient oversight.

The screenshot displays the VivaCivic Review Management dashboard. The left sidebar contains navigation links: Dashboard, Reviews, Inspections, Map, PROJECTS, All Projects, Received, In Application Review, Complete, Incomplete, Denied, Payment Pending, In Plan Check, and Correction Issued. The main content area is titled 'REVIEWS' and shows a list of review items with columns for REVIEW, CYCLE, PROJECT, CREATED ON, STATUS, and ASSIGNED TO. A red box highlights the filter menu, which includes a 'Filters Active' section with 'Massoud Abolhoda' and a 'Group By' dropdown. An inset window provides a detailed view of the filter menu, showing the 'Everyone' user selection and a list of review categories: Addressing, Building, Code Enforcement, Engineering, Environmental, Other, Planning, Water Engineering, and Water Quality. The 'Orange Court - OCFA' filter is also visible.

**REVIEWS** Vinh Vu ▾

Filters Active - M Massoud Abolhoda

GROUP Addressing > REVIEW

Building >

DUE ON Code Enforcement >

Engineering >

Group By Environmental >

REVIEW Other > PROJE

Planning >

Water Engineering >

Orange Court - OCFA Water Quality > A-302 Valley

A-303

REVIEW	CYCLE	PROJECT	CREATED ON	STATUS	ASSIGNED TO
A-302890 - Commercial Building Permit / Tenant Improvement / 12155 Valley View St	Jun 6, 2023	Jun 6, 2023	Pending	Massoud Abolhoda	
A-303241 - Residential Building Permit / Masonry Fence / 12102 Nelson St	Jun 22, 2023	Jun 22, 2023	Submitted	Huong Ly	
A-303618 - Residential Building Permit / Code Enforcement - Alterations / 13289 Earle Dr	Jul 11, 2023	Jul 19, 2023	Submitted	Huong Ly	
G-000018 - VANESSA BUI RESIDENCE / 12532 Volkwood St	Jun 22, 2023	Jul 24, 2023	Submitted	Bob Righetti	
Ha Hao Ngoc Pham RESIDENCE / 11552 Banner Dr	Jun 26, 2023	Jul 26, 2023	Submitted	Bob Righetti	
new detached ADU (1,200 SF) / 11601 Banner Dr	Jun 26, 2023	Jul 28, 2023	Submitted	Bob Righetti	
771 Clinton St Gradino Plans / 13271 Clinton St	Jul 12, 2023	Aug 14, 2023	Submitted	Bob Righetti	

OVERDUE (24)

Update Reviews

**GARDEN GROVE**

Search... [+ Add New](#) [Help](#) [Massoud M](#)

Inspections  
Map  
PROJECTS  
All Projects  
Received  
In Application Review  
Complete  
Incomplete  
Denied  
Payment Pending  
In Plan Check  
Correction Issued  
In Final Review  
Documents Required  
Approved (Plan Routing)  
Ready to Issue  
Issued  
In Inspections

Filters Active - 0 [Collapse All](#) [Show All](#) [Clear All](#)

GROUP REVIEW CYCLE PROJECT CREATED ON

DUE ON STATUS ASSIGNED TO

Group By

Type  
Review  
Cycle  
Due Date

CYCLE PROJECT CREATED ON DUE ON STATUS ASSIGNED TO

**AIR QUALITY (16)**

CYCLE	PROJECT	CREATED ON	DUE ON	STATUS	ASSIGNED TO
Initial	A-300060 - ADU Permit / ADU: New Detached / 13424 Lynne Dr	Feb 22, 2023		Pending	Unassigned
Initial	A-300346 - Residential Building Permit / Addition / 11231 Wakefield Ave	Feb 25, 2023		Pending	Unassigned
Initial	A-300775 - Residential Building Permit / Addition/Remodel / 12642 Cresser Rd	Mar 16, 2023		Pending	Unassigned
Initial	A-300849 - Residential Building Permit / Addition/Remodel / 9912 Oasis Ave	Mar 20, 2023		Pending	Unassigned
Initial	A-300822 - Residential Building Permit / New Single Family Residence / 14361 Pleasant St	Mar 20, 2023		Pending	Unassigned
Initial	A-300740 - Residential Building Permit / Addition/Remodel / 11282 Bixler Dr	Mar 28, 2023		Pending	Unassigned
Initial	A-301492 - Residential Building Permit / Addition/Remodel / 6842 Santa Rita Ave	Apr 11, 2023		Pending	Unassigned
Initial	A-300548 - Residential Building Permit / Addition/Remodel / 11952 Gall	Apr 12, 2023		Pending	Unassigned

[Update Reviews](#)

Filters Active - 0 [Collapse All](#) [Show All](#) [Clear All](#)

GROUP REVIEW CYCLE PROJECT CREATED ON

DUE ON STATUS ASSIGNED TO

Group By

Overdue  
Unassigned

Air Quality  
Building  
Building and Safety  
Engineering  
Environmental  
Environmental Health  
Final

Cycle 1  
Cycle 2  
Cycle 4  
Initial  
Recheck

A-300021 - ADU Permit / ADU: Ne  
A-300024 - ADU Permit / ADU: Ne  
A-300088 - ADU Permit / ADU: Cc  
A-300219 - Commercial Building F  
A-300260 - ADU Permit / ADU: Ne  
A-300265 - ADU Permit / ADU: Ne  
A-300266 - ADU Permit / ADU: Ne

Feb 22, 2022  
Feb 24, 2022  
Mar 7, 2022  
Mar 9, 2022  
Mar 10, 2022  
Mar 11, 2022  
Mar 18, 2022

No data  
Aug 14, 2023  
Aug 17, 2023  
Aug 21, 2023  
Aug 25, 2023  
Jul 19, 2023  
Jul 24, 2023

Final Review  
Pending  
Submitted

Bob Righetti  
Carina Dan  
Huong Ly  
Massoud Abolhoda  
Unassigned

Group By

Search

## Electronic Plan Review and Workflow

Plan review is a critical component of activities in a permitting operation. Viva Civic is designed to facilitate and automate the assignment of projects, routing of documents, and keeping the multi-agency review team informed on the progress and target dates of the project. At the same time, it keeps the customer and the design team updated on their path toward approvals. In addition to generating permit-specific correction lists, Viva Civic can assist the City in developing baseline checklists for customers, ensuring that their submittals meet the most common and crucial requirements prior to submission. This feature improves both the approval rate and the time required to obtain permits.

Viva Civic is integrated with Apryse to provide plan review and plan markup within the platform. This integration allows users to seamlessly access Apryse's robust suite of markup tools directly from the Viva Civic interface, enhancing collaboration and efficiency in the plan review process. Key features include real-time collaboration, advanced markup capabilities, and easy document management. Users can annotate, edit, and review plans within the platform, ensuring all stakeholders are aligned and project timelines are met. This integration supports improved accuracy and consistency in plan review, reducing errors and facilitating better communication among project teams.

### Plan Review Dashboard:

Viva Civic provides user-friendly dashboards that vividly depict the status of projects in real-time. These dashboards offer clear visibility and transparency, enabling stakeholders to easily identify projects at various stages of completion. By providing a comprehensive overview of the statuses of projects, the dashboards empower decision-makers to make informed choices and allocate resources effectively.

Note that managers can see the dashboard of their staff by selecting \staff from this dropdown.



Dashboard

Your Reviews

Your Inspections

All Projects

Received

In Application Review

Complete

Incomplete

Denied

YOUR REVIEWS

Unassigned (10)

In Application Review (0)

In Plan Check (0)

Correction Issued (0)

Approved (0)

In Final Review (0)

View Reviews For

Massoud Abolhoda

BUILDING: 3 REVIEWS

REVIEW	CYCLE	PROJECT	CREATED ON	DUE ON	STATUS	ASSIGNED TO
<div>Building and Safety Application Review</div>	-	A-300244 - Residential Building Permit / Code Enforcement - Demo / 10041 Central Ave	Mar 1, 2023	-	Submitted	<div>Unassigned</div>
<div>PENDING PERMIT</div>		PC2023-067 / Residential: Patio Cover				

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**Plan review interface:** From project Overview Page, user can initiate review type.

The screenshot illustrates the plan review interface in Viva Civic. It shows a sidebar with navigation options like 'MANAGE' (Contacts, Users, Citizens), 'REPORTS' (All Reports), 'CONFIGURATION' (Project Types, Document Types, Fees), and 'Expired'. The main content area displays a project overview for 'A-305120 - Residential Building Permit / Addition / 12652 Main St / Cycle 1'. A red arrow points from the 'PLAN CHECKS' section in the sidebar to the 'Building' option in the 'PLAN CHECKS' list. Another red arrow points from the 'Building' option in the 'PLAN CHECKS' list to the 'Building' option in the 'PLAN CHECK OVERVIEW' section. The 'PLAN CHECK OVERVIEW' section shows details for the 'Building' plan check, including the type, cycle, status, and assigned to. A dropdown menu for 'Status' is open, showing options: 'Submitted' (selected), 'Conditional Approval', and 'Approved'. The 'TIMELINE' section shows a 'Submitted' status on 'Oct 26, 2024'. The 'DETAILS' section shows the 'PLAN CHECK OVERVIEW' for 'Building'. The 'CORRECTIONS' section shows a message: 'Corrections list is empty.' The 'PLAN CHECK DOCUMENTS' section shows a document: 'Supporting\_Effective\_Communication\_Module\_Completion\_Certificate.pdf' (95.9 KB, Saiful Islam, Oct 26, 2024). The 'ATTACHMENTS' section shows a search bar and a 'New folder' button.

**PLAN CHECKS**

	ASSIGNED TO	CREATED ON	DUE ON	COMPLETED ON	ATTACHMENTS	STATUS
Cycle 1	-	Oct 26, 2024	-	-	Supporting_Effective_Communication_Module_Completion_Certificate.pdf	Submitted
Building	-	Oct 26, 2024	-	-	-	Submitted
Planning	-	Oct 26, 2024	-	-	-	Submitted

**OVERVIEW**  
Project Address: 12652 Main St, Garden Grove, CA 92840

**PLAN CHECK OVERVIEW**

Type: Plan Check  
Plan Check Cycle: Cycle 1  
Residential Building Permit: A-305120 - Residential Building Permit / Addition / 12652 Main St / Cycle 1  
Status: Submitted (since Oct 26, 2024 / by Saiful Islam)  
Assigned To: [User Icon]

**TIMELINE**

Submitted Oct 26, 2024

**DETAILS**

PLAN CHECK OVERVIEW  
Type: Building

**CORRECTIONS**

Corrections list is empty.

**PLAN CHECK DOCUMENTS**

Supporting\_Effective\_Communication\_Module\_Completion\_Certificate.pdf  
95.9 KB | Saiful Islam | Oct 26, 2024

**ATTACHMENTS**

Attached Files

### Document Management:

Viva Civic incorporates a user-friendly built-in document management system that effectively organizes submitted documents based on their respective project phases. This integrated approach eliminates the need for external document management software and simplifies document access and retrieval within the system.

One notable feature of Viva Civic's document management system is its flexibility in document retention. Certain critical documents, such as approved plans, design files, or signed legal forms, can be configured to be retained indefinitely.

A significant advantage of Viva Civic is the absence of restrictions on the number of documents that can be attached to a project. The system's automation engine can be customized to automatically remove specific documents after a designated period or upon the issuance of specific permits. This functionality proves valuable in eliminating outdated documents once construction is finished or after a predetermined timeframe set by the City.

Permitted documents are securely stored within Viva Civic and can be made accessible to the public, in line with the Town of Freedom's transparency policy. This commitment to transparency ensures that relevant public documents are readily available to interested parties, promoting accessibility and openness in the permit process.

	ASSIGNED TO	CREATED ON	ON	ON	ATTACHMENTS
Cycle 3	-	Apr 17, 2023	-	-	24x36 grading plan 13381 Barnet Way 230109 13381 Barnett Way-GG-PLAN.pdf Correction Responses on 04-06-2023- (2).pd Garden Grove-Mike Pham-13381 Barnett Way
Water Engineering	Tommy Son	Apr 17, 2023	-	Apr 18, 2023	-
Conditions: No new water meter or separate sewer lateral connection requested on application and plans. A revision to plans and connection fee will be applied if separate water and/or sewer is requested.					
Planning	Huong Ly	Apr 17, 2023	-	-	-
Environmental	Soumelia Gountouma (Lia)	Apr 17, 2023	-	-	-
Addressing	Aaron Hodson	Apr 17, 2023	-	Apr 20, 2023	-
Building	Scott Fazekas & Associates, Inc.	Apr 17, 2023	-	Apr 24, 2023	45-22 PC 2022-567 13381 Barnett Way 3rd.do
Engineering	Alicia Hofer	Apr 17, 2023	-	Apr 18, 2023	-
Note: GRADING PERMIT ISSUED. SEE 23-0869					
Conditions: FLOOD ZONE- GRADING PERMIT ISSUED. DO NOT FINAL PRIOR TO ENGINEERING FINAL INSPECTION.					
Cycle 2	-	Mar 20, 2023	-	Apr 6, 2023	13381 Barnett Way-GG-PLANS.pdf 13381 Barnett Way-GG - Struct Cal Report.pdf 13381 Barnett Way-GG-PLANS.pdf Topo & Grading Plan-soil-FEMA-13381 Barnett 13381 Barnett Way-GG-PLANS.pdf

## Inspections, Tracking and Scheduling

Viva Civic provides a robust solution for scheduling, organizing, and implementing inspection appointments with a user-friendly calendar interface. Our platform includes the following features:

1. **Scheduling Inspections:** Viva Civic allows users to schedule inspection appointments based on permit application types. This ensures that inspections are organized and managed efficiently, tailored to the specific requirements of each permit type.
2. **User-Friendly Calendar Interface:** Our platform features an intuitive calendar interface that enables users to view, manage, and organize inspection schedules with ease.
3. **Specific Time Slots:** Viva Civic supports the ability to schedule inspections at specific time slots, providing flexibility and precision in managing inspection appointments.
4. **Inspection Results Management:** The system enables the recording and tracking of inspection results, ensuring that all information is documented and accessible.
5. **Notifications and Reminders:** Viva Civic includes automated notifications and reminders for both inspectors and applicants.

**Specific Inspection Type:** Viva Civic is designed to have permit-specific inspection types. This feature ensures that only applicable and relevant inspections are available for customers to select.

**Routine and Periodic Inspection:** Viva Civic includes robust features to track both routine and periodic inspections of buildings and properties. It also efficiently manages all building inspection scheduling activities, ensuring thorough oversight and streamlined operations.

**Inspection Scheduling:** Viva Civic's user interface allows online customer inspection scheduling requests and provides calendaring functionality for inspectors. This enables inspectors to easily create a daily schedule from inspection requests, ensuring efficient and organized inspection management.

□ Projects > A-305092 > Add Inspection

Add Inspection

DETAILS

INSPECTION OVERVIEW

Type	Please select the inspection type (required) ▼
Inspection Date	mm/dd/yyyy 📅
Customer Note(s)	(optional)

Create Inspection

### Inspection Dashboard:

Inspection Dashboard provide the inspector access to calendar of inspection, unassigned inspection, past-inspection, Today Inspection and upcoming inspection.

Screenshot of Calendar View:

INSPECTIONS FOR RYAN DAKE

Calendar

Unassigned (3)

← Past Inspections

Today's Inspections (11)

→ Upcoming Inspections

INSPECTIONS CALENDAR

< > TODAY MONTH WEEK

December 2023

SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	1	2
	Total: 58	Total: 57	Total: 45	Total: 66	Total: 1	
	Diane: 6	Diane: 5	Diane: 11	Diane: 6	Vincent: 1	
	Jordan: 13	Jordan: 6	Jordan: 11	Jordan: 19		
	Ryan: 11	Ryan: 10	Ryan: 6	Ryan: 1		
	RyanQ: 12	RyanQ: 15	RyanQ: 11	RyanQ: 11		
	Sylvia: 8	Sylvia: 8	Sylvia: 6	Sylvia: 8		
	Vicki: 7	Vicki: 12		Vicki: 21		
	Vincent: 1	Vincent: 1				
3	4	5	6	7	8	9
	Total: 74	Total: 76	Total: 81	Total: 45	Total: 55	
	Diane: 11	Diane: 11	Diane: 12	Unassigned: 3	Diane: 6	
	Jordan: 27	Jordan: 19	Jordan: 33	Diane: 11	Jordan: 7	
	Ryan: 7	Olegario: 1	Olegario: 1	Jordan: 4	Olegario: 7	

## Screenshot of Unassigned view

INSPECTIONS FOR RYAN DAKE Ryan Dake

Calendar **Unassigned (3)** Past Inspections Today's Inspections (11) Upcoming Inspections

**3 INSPECTIONS**

INSPECTION	PROJECT	ZONE	DATE	TIME FRAME	STATUS	ASSIGNED TO
Underground Gas Piping	2023-13446 / A-302388 - ADU Permit / ADU: New Detached / 12703 Josephine St	074	Dec 7, 2023	(not set) (not set)	Pending	Unassigned
Underground Conduit	2023-13446 / A-302388 - ADU Permit / ADU: New Detached / 12703 Josephine St	074	Dec 7, 2023	(not set) (not set)	Pending	Unassigned
Plumb Water Groundwork	2023-13446 / A-302388 - ADU Permit / ADU: New Detached / 12703 Josephine St	074	Dec 7, 2023	(not set) (not set)	Pending	Unassigned

[Update Inspections](#)

## Screenshot of Today Inspection

INSPECTIONS FOR RYAN DAKE Ryan Dake

Calendar Unassigned (3) Past Inspections **Today's Inspections (11)** Upcoming Inspections

[Print Inspections](#)

**TODAY'S INSPECTIONS (11)**

SEQ.	INSPECTION	PROJECT	ZONE	DATE	TIME FRAME	STATUS	ASSIGNED TO
1	Exterior Lath	2023-13058 / A-301097 - ADU Permit / ADU: New Detached / 12738 West St	144	Dec 6, 2023	10:30 AM 1:30 PM	Pending	Ryan Dake
2	Rough Mechanical	2023-13058 / A-301097 - ADU Permit / ADU: New Detached / 12738 West St	144	Dec 6, 2023	10:30 AM 1:30 PM	Pending	Ryan Dake
3	Rough Wiring	2023-13058 / A-301097 - ADU Permit / ADU: New Detached / 12738 West St	144	Dec 6, 2023	10:30 AM 1:30 PM	Pending	Ryan Dake

## Screenshot of Upcoming Inspection:

The screenshot shows the 'INSPECTIONS FOR RYAN DAKE' page with the 'Upcoming Inspections' tab selected. The interface includes a top navigation bar with tabs for 'Calendar', 'Unassigned (3)', 'Past Inspections', 'Today's Inspections (1)', and 'Upcoming Inspections'. Below the navigation bar, there are filters and search options. The main table displays inspection details for December 7, 2023.

INSPECTION	PROJECT	ZONE	DATE	TIME FRAME	STATUS	ASSIGNED TO
Pre-Inspection/Sheathing	2023-14508 / A-306701 - Reroof Permit / 13332 Greentree Ave	163	Dec 7, 2023	(not set)	Pending	Ryan Dake
Electrical Final	2023-14197 / A-306219 - Residential Electrical Permit / Service Panel Upgrade / 12061 Stanford Ave	144	Dec 7, 2023	(not set)	Pending	Ryan Dake
Pre-Inspection/Sheathing	2023-14183 / A-306156 - Reroof Permit / 12531 Morningside Ave	157	Dec 7, 2023	(not set)	Pending	Ryan Dake

Screenshot of Past Inspection: Inspectors have the capability to access past inspections, search for projects with a Pending Status, and seamlessly input the necessary results.

The screenshot shows the 'INSPECTIONS FOR RYAN DAKE' page with the 'Past Inspections' tab selected. The interface includes a top navigation bar with tabs for 'Calendar', 'Unassigned (3)', 'Past Inspections', 'Today's Inspections (11)', and 'Upcoming Inspections'. Below the navigation bar, there are filters and search options. The main table displays inspection details for December 5, 2023. A dropdown menu is open, showing status options: 'Corrections Required', 'No Access To Property', 'Not Ready', 'Partial Pass', 'Pending', and 'Progress Made'. The 'Pending' status is highlighted.

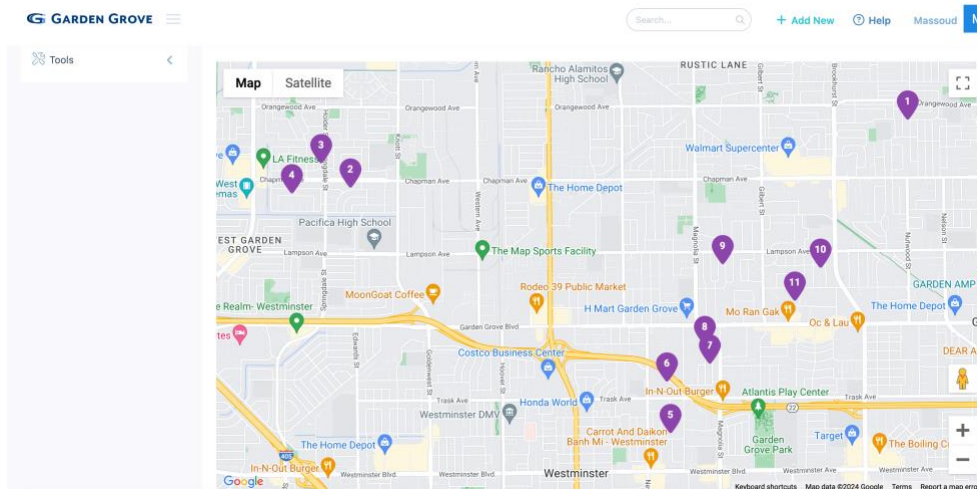
INSPECTION	PROJECT	ZONE	DATE	TIME FRAME	STATUS	ASSIGNED TO
Slab	2023-14060 / A-304219 - ADU Permit / ADU: New Detached / 11745 Puryear Ln	142	Dec 5, 2023	9:30 AM - 12:30 PM	Approved	Ryan Dake
Ufer Ground	2023-14060 / A-304219 - ADU Permit / ADU: New Detached / 11745 Puryear Ln	142	Dec 5, 2023	9:30 AM - 12:30 PM	Approved	Ryan Dake

**Email reminder for non-active projects:** Viva Civic can be configured to provide email notifications for permits with no activity.



**Automatic Closure of Permits:** Viva Civic can be configured to automatically close permits upon a successful final inspection. This feature streamlines the permit management process, reducing administrative workload and ensuring that permits are accurately tracked and completed.

**Map of Daily Inspections:** Viva Civic presents inspectors' daily inspections on a Google map, allowing inspectors to modify their route.



### A.3 Mobile Inspections:

Field inspectors can use mobile devices to view permit information, complete inspections, and update records in real-time. This reduces delays in reporting and improves overall service efficiency.

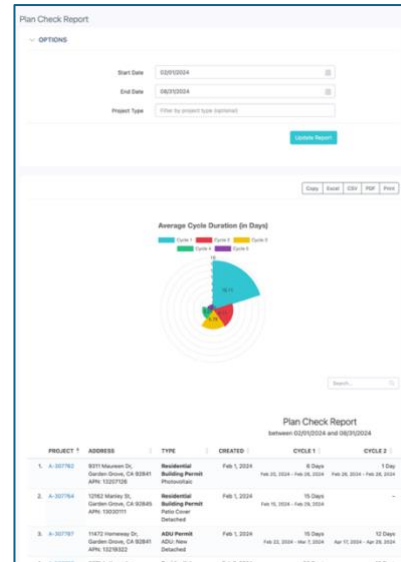
Viva Civic's responsive design, combined with its fully web-based system, enables real-time access to all its features from the field through any device with internet connectivity. The responsive design ensures that the system's pages are displayed in a user-friendly manner, even on smartphones. This allows inspectors to conveniently perform inspections, view project details, and enter inspection results directly from their smart phone or other mobile devices.

Having complete access to the system empowers inspectors to input fees and conduct other tasks such as adjusting accounts for situations like missed inspections or no-shows. Inspectors can identify unpermitted work by accessing permit history on Viva Civic and can also add ad-hoc or unscheduled inspections in the field.

Viva Civic also allows for easy attachment of pictures to inspection reports. Inspectors can conveniently capture and include visual evidence as part of their inspection process. Furthermore, the system provides quick access to all contact details related to the owner, applicant, contractor, or complainant. This includes retrieving attached plans and accessing comprehensive data by searching various parameters such as permit number, contractor name, address, and more.



**Ad-hoc Report Writer:** Each module of Viva Civic is equipped with a wide range of reports that capture relevant information specific to that module. These reports offer comprehensive insights and are designed to present data in a visually appealing manner, utilizing charts and graphics for enhanced presentation.



**New Ad-Hoc Report**

Options

Title: New Ad-Hoc Report

Columns: Project, Status, Work Type, Address, Created At, Issued On, Permit Number, Valuation, Invoiced, Paid, Balance

Please note that any changes to the column list will reset the report filters.

Start Date: 07/01/2024

End Date: 07/31/2024

Create Report

Ad-hoc report writer generates a general report is created that then can be filtered to include or exclude data using simple interfaces

Copy Excel CSV PDF Print

REPORT FILTERS (2)

AND

Status Equals Issued

Work Type Equals

+ Add Condition

ADU: Conversion Attached

ADU: Conversion Detached

ADU: New Attached

ADU: New Detached

Addition/Remodel

Alteration

Banner Permit

City Job

Code Enforcement - Additions

Code Enforcement - Alterations

Code Enforcement - As Built Additions

Code Enforcement - Attached Structure

Code Enforcement - Converted space

Code Enforcement - Demo

Code Enforcement - Demo & Restore

Code Enforcement - Remodel

Code Enforcement - Repair

PROJECT STATUS WORK TYPE

1. 2023-12111 / A-303549 - Commercial Building Permit / Fire Suppression /

ISSUED ON PERMIT NUMBER VALUATION INVOICED PAID BALANCE

2023-07-06 2023-12111 \$2,500.00 \$0.00 \$0.00 \$0.0

**Reports Filtering:** Viva Civic reports come equipped with filtering options that empower users to customize their analysis. Users can choose a specific date range or apply other relevant filtering criteria to refine their results. For instance, when accessing the Valuation and Fees report, the following filtering options are available for selection.

IN PLAN CHECK Showing 1 to 50 of 159

Type Work Type Created Sort

Filter By Type

☐ ADU Permit

☐ Backflow Protection Permit

☐ Commercial Building Permit

☐ Commercial Plumbing Permit

☐ Grading Permit

☐ JADU Permit

☐ Plan Routing Project

☐ Residential Building Permit

☐ Residential Mechanical Permit

☐ Residential Plumbing Permit

☐ Right-of-Way Permit

☐ Sign Permit

☐ Water Meter Permit

Apply Filter

A-301970 - Residential Building Per...  
Residential Building Permit 12652 Main S

A-301966 - Residential Mechanical I...  
Residential Mechanical Permit 12636 Mai

A-301963 - Residential Building Per...  
Residential Building Permit 12302 Gammi

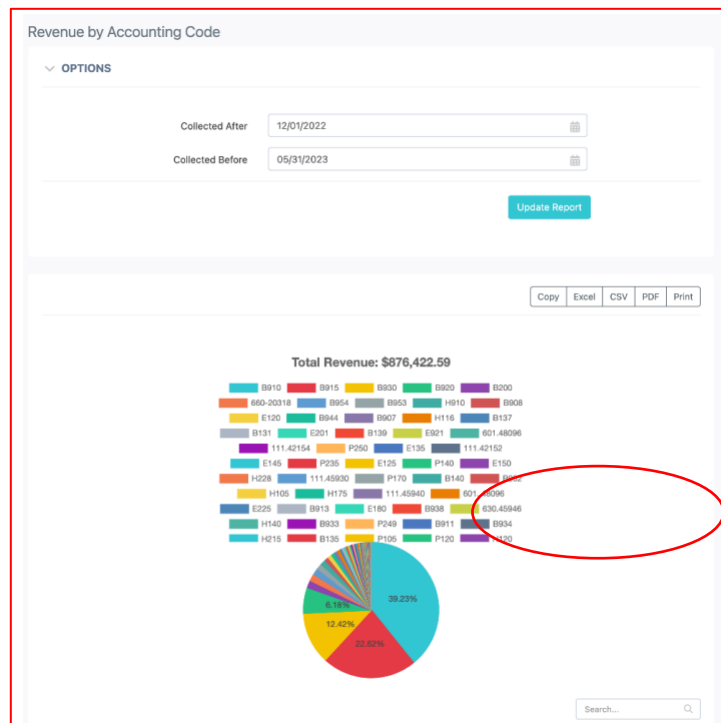
G-000012 - Medical Office / 12692 C...  
Grading Permit 12692 Garden Grove Blvd

St / Cycle 1 - Plan Check  
Jun 7, 2023

Cycle 1 Plan Check  
23 May 7, 2023

Cycle 2 Plan Check  
23 Jun 7, 2023

Apr 24, 2023 Apr 26, 2023



**Report Exports:** Moreover, Viva Civic provides the option to export reports in various formats, such as Microsoft Excel, PDF, and CSV. This versatile functionality empowers users to conveniently save and share reports in their preferred format, improving accessibility and ease of use. Please see the circled area of sample report next page.

## A.5 Dashboards

Viva Civic provides user-friendly dynamic dashboards that vividly depict the status of projects in real-time. These dashboards offer clear visibility and transparency, enabling stakeholders to easily identify projects at various stages of completion. By providing a comprehensive overview of the statuses of projects, the dashboards empower decision-makers to make informed choices and allocate resources effectively.

Here is a partial screenshot of the main page dashboard for the City of Garden Grove.

Viva Civic dashboards can be utilized to present live and dynamic information on performance, revenue, workload, and other vital metrics. These dashboards keep staff informed and assist with decision-making processes.





## A.6 Automated Workflow

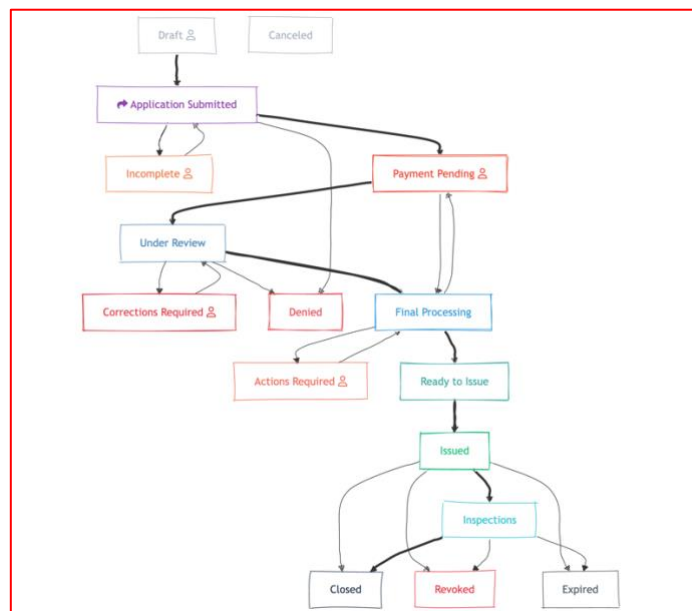
Viva Civic presents an exceptionally robust workflow engine that serves as a catalyst for automating processes within the Town of Freedom. With its adaptable nature, this workflow engine can be seamlessly modeled to automate various plan review and approval processes undertaken by the City for the review of Building, Planning, Engineering and any other internal or external agency. Likewise, the workflow engine can model code enforcement cases based on the City's processes for different types of violations. The business licenses can also have various types of workflows based on the type of business licenses requested. Please see a short informative video about Viva Civic Workflow Automation at this link:

<https://www.vivacivic.com/work-flow-automation/>

The true strength of the Viva Civic workflow engine lies in its versatility. This powerful engine can accommodate even the most intricate and complex processes, effortlessly translating them into visually engaging flowcharts.

For example: For permitting workflow, we start with a standard Permitting Review and Inspection process, such as the one depicted here. We then collaborate with City staff to refine it by:

- Identifying review agencies
- Identifying hearing boards
- Establishing timelines for each phase/cycle of review
- Defining approval dependencies





- e) Defining exceptions
- f) Identifying appeal processes, if applicable
- g) Identifying inspection types, categories, and applicability for each permit type
- h) Identifying possible inspection results and their dependencies

**APPLICATION REVIEW**

☐ Addressing
 ☐ Building and Safety
 ☐ Code Enforcement
 ☐ Engineering
 ☐ Environmental
 ☐ Planning

☐ Water Engineering
 ☐ Water Quality
 [Start Application Review](#)

Each permit/application type can have its own automated workflow, resulting in streamlined processing. The Viva Civic workflow engine is able to assign projects to both internal and external agencies based on the established processes of the City. If necessary, a Viva Civic workflow can be further customized to route the project to a

	ASSIGNED TO	CREATED ON	DUE ON	COMPLETED ON	ATTACHMENTS
Cycle 1	-	Jun 1, 2023	-	-	<a href="#">permit-declaration-3-25-20.pdf</a> <a href="#">Plan Check Permit App Fillable 09.24.2020.pdf</a> <a href="#">NGC23-01 CAPOC - Garden Grove CA - Drawing</a> <a href="#">NGC23-01 CAPOC Garden Grove CA Calculations</a> <a href="#">NGC23-01 CAPOC - Garden Grove CA - Drawing</a>
Building	Scott Fazekas & Associates, Inc.	Jun 1, 2023	-	-	-
Engineering	Kamyar Dibaj	Jun 1, 2023	-	-	-
Environmental	Albert Holmon II	Jun 1, 2023	-	Jun 1, 2023	-
<p><b>Note: IMPORTANT PLEASE READ THOROUGHLY</b>            Complete the following steps in order to create your Construction Waste Management Plan (CWMP).            Create an account using Green Halo System at <a href="http://www.gardengrove.wastetracking.com">www.gardengrove.wastetracking.com</a>            Log in to account and submit a CWMP plan            Upload all weight tickets and submit for final review to complete the CWMP process.            Order container(s) through City's exclusive hauler Republic Services. When ordering your container from Republic Services, inform Customer Service that the contain... <a href="#">more</a></p>					
Planning	Maria Parra	Jun 1, 2023	-	Jun 5, 2023	<a href="#">A-302617-CY1-CO-Planning (F).pdf</a>
Water Quality	Water Quality Division	Jun 1, 2023	-	Jun 5, 2023	-

specific person based on the nature of the project. For example, electrical plan reviews that are very specialized can be routed to staff with the necessary skills to review such a project. This automated assignment process ensures that projects are routed to the appropriate agency, eliminating any unnecessary delays or confusion. Furthermore, the workflow engine auto-notifies the assigned agents when a project is routed to their operation, enabling them to promptly take action.

## A.7 Alerts and Warning:

Viva Civic has Viva Civic fully meets and exceeds all general system functionality requirements Viva Civic fully meets and exceeds all general system functionality requirements built-in messaging system that allows staff communicate internally and across various departmental. The responsive design of the software allows field staff to see the message related to the project on the phone or tablet device.

Please see a short informative video about Viva Civic Communication features at this link:

<https://www.vivacivic.com/viva-civic-communication/>

**Real-time Data Entry from field:** Viva Civic allows inspection results to be updated from the field, making them immediately available to the permit holder. Furthermore, upon the completion of an inspection, Viva Civic automatically sends email notifications to permit holders with the inspection results.

**Email reminder for scheduled inspections:** Viva Civic can be configured to automatically send email reminders for scheduled and upcoming inspections. However, for inspectors who conduct a handful of inspections each day, this can be overwhelming. We recommend using the inspector dashboard for this purpose. The Inspector Dashboards provide a clear picture of their daily inspections, upcoming inspections, and past inspections.

## A.8 GIS Integration

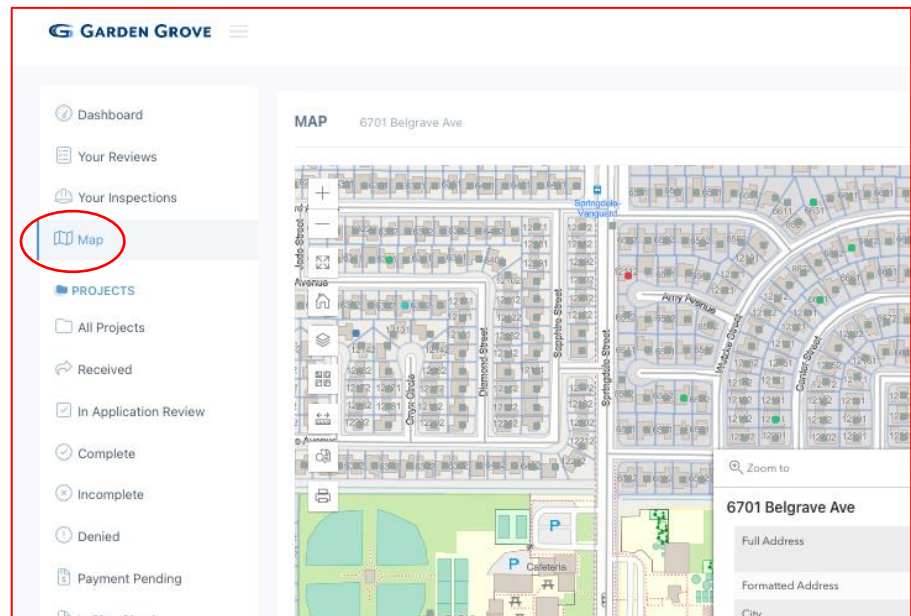
Viva Civic fully meets the City's GIS integration requirements by offering seamless integration with the City's ESRI-based GIS system. The platform provides automatic retrieval and updates of property and owner information, ensuring real-time accuracy. Our solution allows users to initiate applications, permits, and code enforcement cases directly from the map interface, simplifying workflows. With tools for parcel searches, shape drawing, GIS layers, and real-time data visualization, Viva Civic streamlines GIS-based operations while ensuring accurate, tailored geographic insights for City staff and applicants.

Please see our short video for GIS on this link:

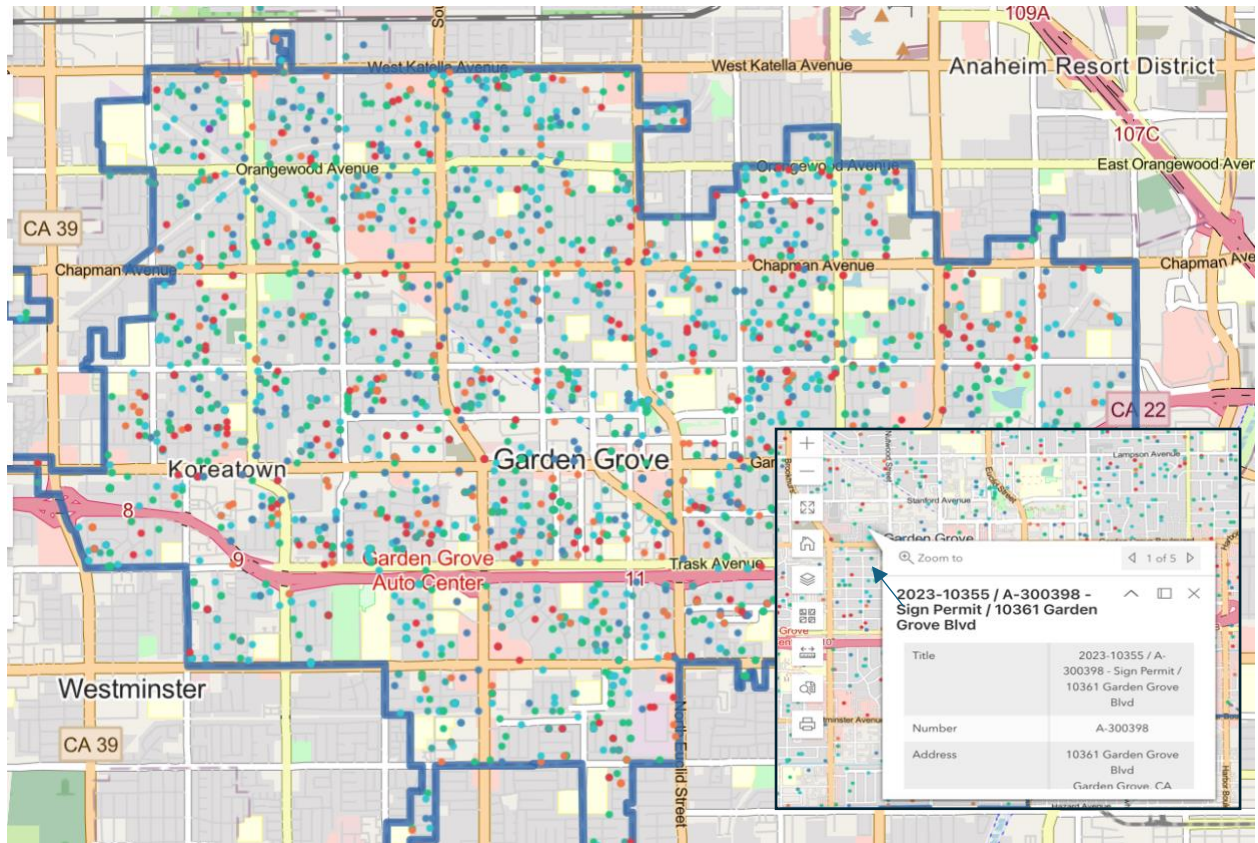
<https://www.vivacivic.com/viva-civic-gis/>

### Here's an overview of the GIS features:

**Accessing GIS map:** Staff can conveniently access GIS mapping directly through the system interface, eliminating the need to open a separate GIS system window. This integrated feature streamlines accessibility and enhances efficiency for users within the platform.

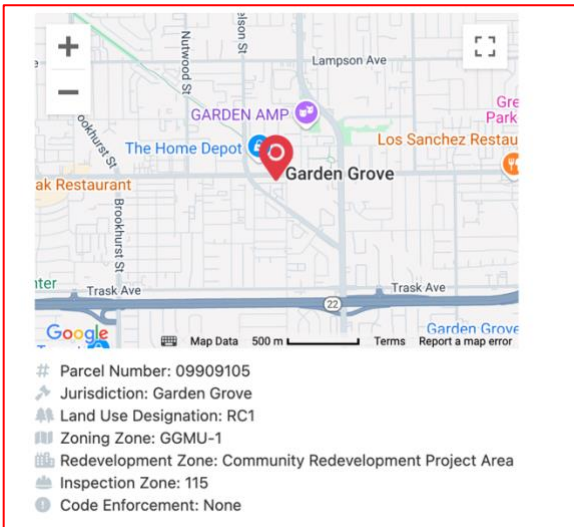


**Viva Civic GIS Interface:** The GIS interface allows users to view permitting and inspection data managed by Viva Civic on top of the CITY GIS data. Users can initiate processes directly from the map, such as issuing a new permit or creating a code case. Right-clicking on a parcel brings up a menu to select various actions, seamlessly integrating with Viva Civic.



**Automatic Data Retrieval:** Our seamless GIS integration extracts vital information, such as zoning designations and special hazard zones, directly from GIS layers. This information is then presented on Viva Civic's overview page, providing informed insights to facilitate decision-making.

**Parcel and Address Tools:** Users have access to parcel search tools, including parcel ID, owner, and address search. Geocoding services enable address searches based on street centerline, address points, parcels, or a combination of data types. Users can also select multiple parcels to create Viva objects or perform mass mailings based on selected addresses.

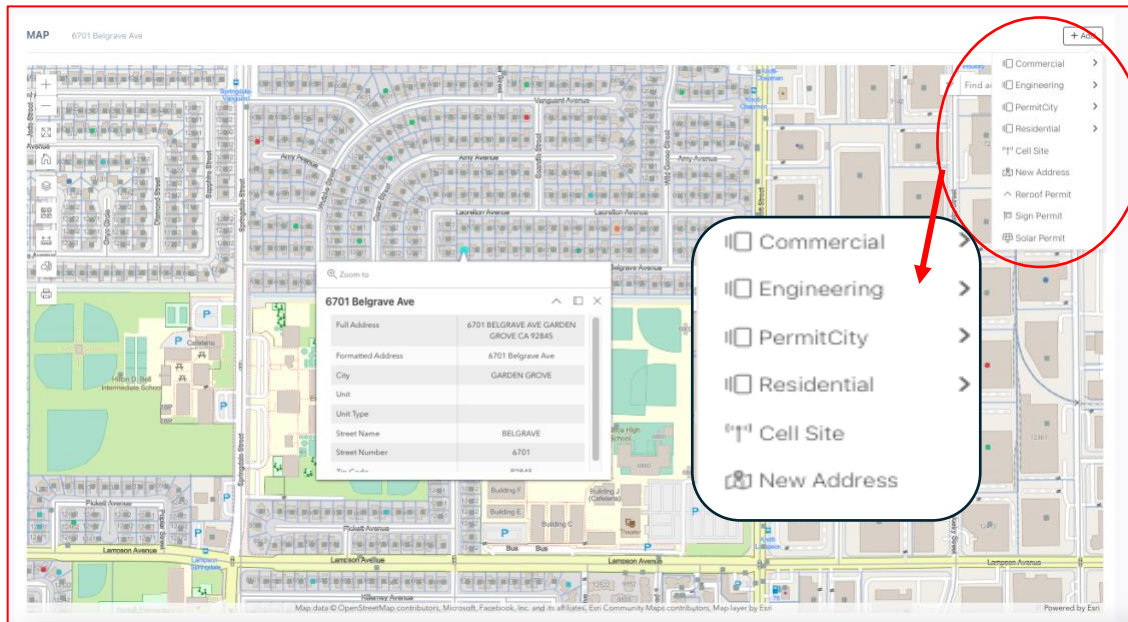


**Viva Civic Query and Object Info:** The GIS integration includes query tools to plot application, permits, code cases, projects, licenses, and inspection data on the map. Clicking on these plotted locations brings up a subset of the object's attributes and a link to view the details in the main Viva



Civic application. The interface enables Viva Civic to open the map and jump to a specific parcel, address, or Viva object.

**Starting Application from GIS map:** User can start a new application by selecting a location or several parcels and the click on “Add” to select the permit application that would like to initiate, the application gets populated with the project address or Parcel ID and other information from GIS.



**Starting an Application by Dropping a Pin or Drawing a Shape:** Users can either drop a pin or draw a shape to designate the location of a project and start an application. This feature is particularly useful for permits in right-of-way areas, code enforcement cases, and asset management where there is no specific address or parcel associated with the location.

Projects > Add Right-of-Way Permit


## Add Right-of-Way Permit

### DETAILS

#### OVERVIEW

Project Address

Affected Area



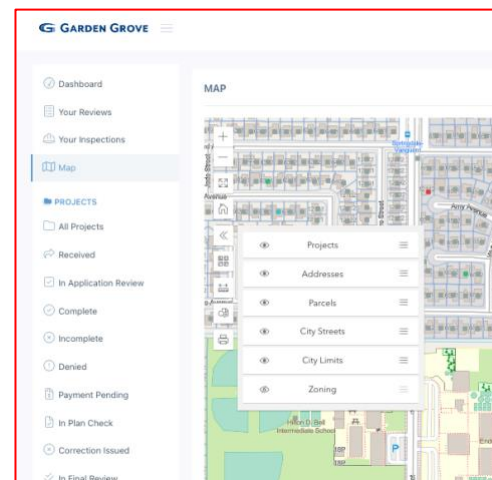
Map data © OpenStreetMap contributors, Microsoft, Facebook, Inc. and its affiliates, Esri Community Maps ... Powered by Esri

Please draw on the map the full extent of the affected area within the right-of-way.

Assessor's Parcel Number (APN)

Project Name

**GIS layers :** Viva Civic allows clients to select and integrate specific GIS layers, such as property ID#, address, legal description, zoning, ownership information, and more. This customization ensures that the integrated GIS data aligns precisely with the client's needs and preferences for a tailored experience.



## A.9 Private and Public messaging/notes

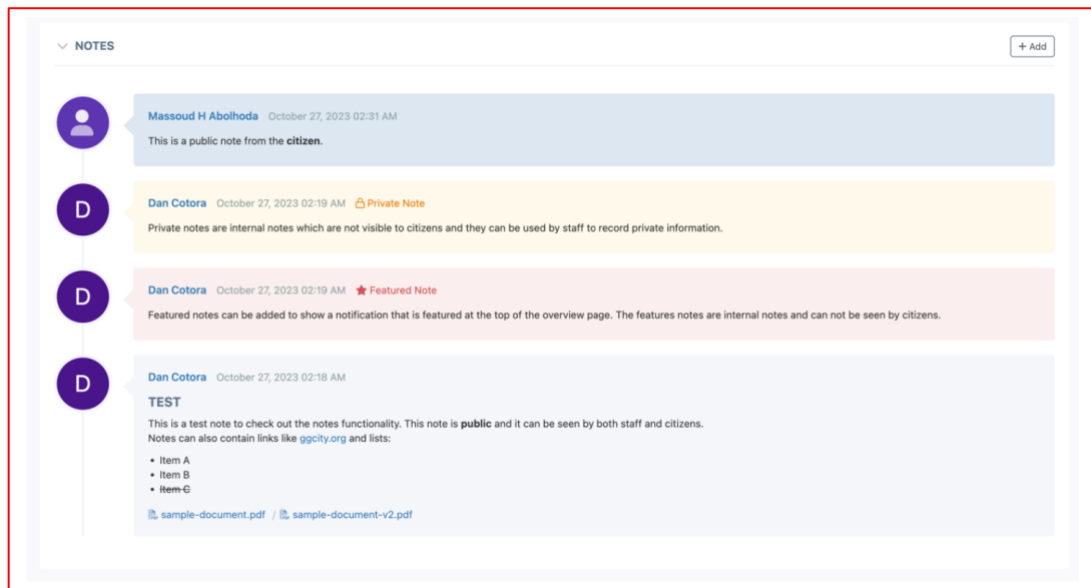
Each permit type has a "Notes" section that allows both staff & customers to add notes to. The section can be enabled/disabled individually for each permit type and it supports 3 types of notes:

- **Public notes:** these are notes that are viewable by everyone, including citizens; they can be used to have a conversation with the citizens regarding the project.

- **Featured notes:** these are notes that are only visible internally by all staff members but will be featured at the top of the overview page; they can be used to record important project information like holds etc.

- **Private notes:** similar to featured notes, these are only visible internally but will not be featured at the top of the overview page; they can be used to privately record information about the project that shouldn't be visible to citizens.

The public, featured and private notes are all displayed in different colors: blue, red and yellow respectively. In addition to this, notes from citizens will also have a slightly different shade of blue to make it easier to distinguish them from notes by made staff.



Staff can enter notes either from note section on overview page as shown earlier or they can enter note from Plan Check interface or from Inspection section.

## A.10 Automated Email Notification:

Viva Civic provides an automated email notification feature for public users as well as the City staff to keep everyone informed. This includes emailed reminders and time-based notifications, ensuring that users are kept informed throughout their application process. In addition to role specific dashboard that keeps staff informed on their assignment, workload and KPI, Viva Civic has email notification that can auto generate emails on certain actions, such as whenever a project is assigned, a due date is approaching or project status is changed. Viva Provide admin tools to customize auto notifications emails. Viva Civic reports come with strong filtering features.

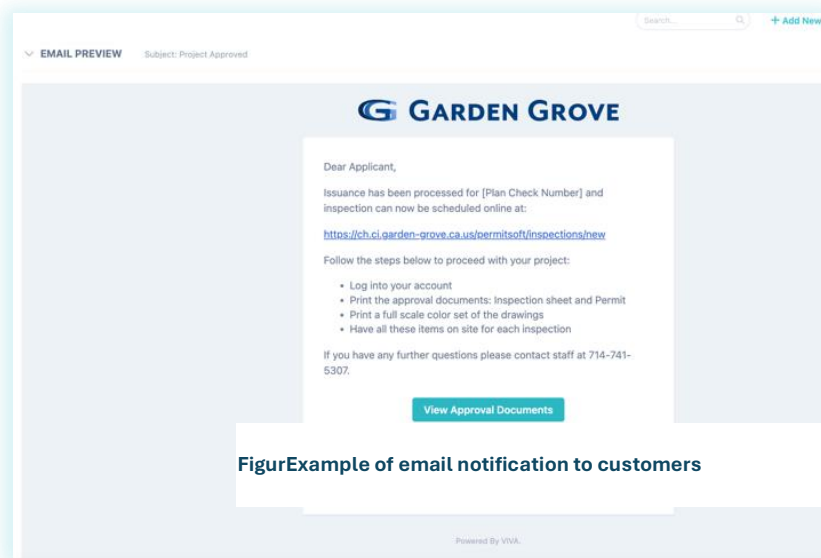
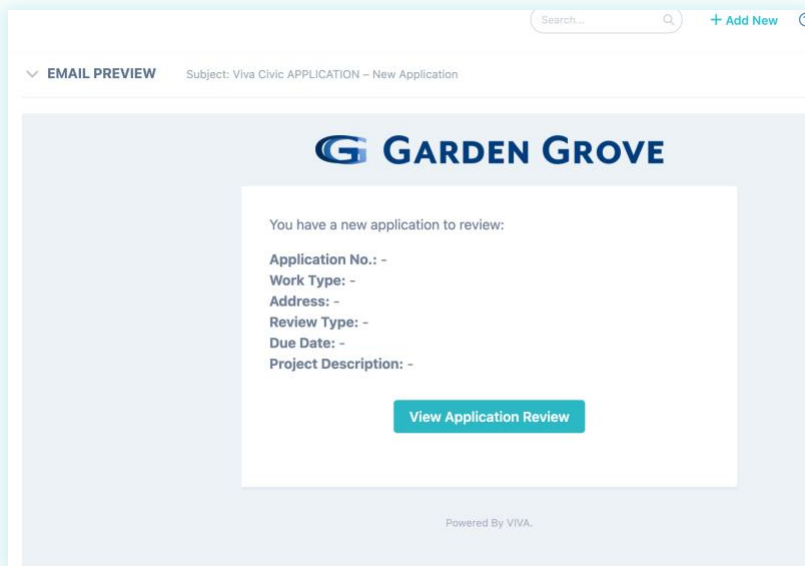


Figure Example of email notification to customers

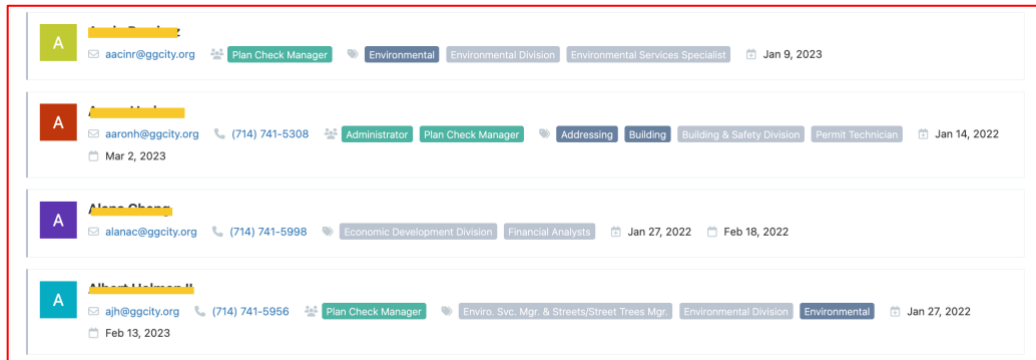


Example of email notification to Staff



## A.11 Granular User Permissions

Viva Civic provides the ability to assign granular permissions to users, ensuring that access to various features and data is precisely controlled. This allows administrators to tailor user access based on roles and responsibilities, enhancing security and operational efficiency. With customizable permission settings, organizations can ensure that users only have access to the information and functions necessary for their specific tasks.



### Partial view of granular user permission

## A.12 Audit Trail and Change Tracking

Viva Civic includes comprehensive audit capabilities, allowing for the tracking and auditing of any and all changes made within the software. This feature ensures transparency and accountability by maintaining detailed logs of user actions and modifications. The audit trail is crucial for compliance, security, and internal reviews, providing a clear record of who made changes, what changes were made, and when they occurred.

John Claxton

September 7, 2023 02:54 PM

Added Invoice 74589

John Claxton

September 7, 2023 02:54 PM

Changed status to Complete

John Claxton

September 7, 2023 02:05 PM

Changed status to Application Review

John Claxton

September 7, 2023 02:05 PM

Added Building and Safety Application Review: Building and Safety Application Review

John Claxton

September 7, 2023 02:04 PM

Assigned to John Claxton

Stephanie Volpe

September 7, 2023 01:32 PM

Changed status to Application Received

Stephanie Volpe

September 7, 2023 01:32 PM

Attached Authorization Letter.pdf

Stephanie Volpe

September 7, 2023 01:31 PM

Created Residential Electrical Permit: 2023-13176 / A-304947 - Residential Electrical Permit / Temporary Power Pole / 9671 Royal Palm Blvd

23BDP-01139 1st S

A partial view of audit trail



# Online CRM Solution for the Town of Freedom, Wisconsin



<b>Company Name:</b>	Polimorphic	<b>Contact Name:</b>	Nav Ramineni
<b>Company Phone:</b>	(949) 375-2015	<b>Contact Phone:</b>	201-338-0518
<b>Company Fax:</b>	919-812-1803	<b>Contact Email:</b>	nav@polimorphic.com
<b>Company Address:</b>	122 W 26th St. #1104	New York, NY	10001
<b>Website Address</b>	<a href="https://www.polimorphic.com/">https://www.polimorphic.com/</a>	<b>Federal Taxpayer ID #:</b>	84-1815036

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## Cover Letter

The Town of Freedom faces unique challenges as a small, but rapidly developing municipality with limited staff resources and growing service demands. Polimorphic offers a tailored solution that directly addresses these challenges, leveraging AI-driven automation and a unified platform to maximize efficiency for your office while dramatically improving resident access to services.

As the first CRM built exclusively for local government, Polimorphic understands the evolving expectations of today's constituents who demand accessibility, self-service options, transparency on resolution times, and the ability to find information quickly and accurately.

Key benefits of our proposed solution include:

- Rapid sub-6-month implementation of a unified system for building permits, zoning approvals, and business licenses
- AI powered tools to maximize efficiency for your limited staff
- 24/7 resident access even during weekends, holidays, and other office closures
- Integrated payment processing with multiple gateway options
- Robust document management supporting all standard file types, including CAD

Polimorphic's solutions address Freedom's specific staffing limitations and need for quick deployment. Our comprehensive integration of core requirements with AI-driven automation will maximize efficiency for your limited staff while improving resident access to services. Our robust training program and long-term cost-effectiveness demonstrate our commitment to successful adoption and alignment with your budget considerations.

We hope to partner with the Town of Freedom.

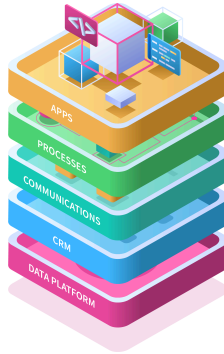
Sincerely,

A handwritten signature in black ink, reading "Parth Shah". The signature is fluid and cursive, with the first name "Parth" and last name "Shah" clearly distinguishable.

Parth Shah  
CEO, Polimorphic



## Introduction



### **Designed Specifically for Small Municipalities**

Polimorphic is the first CRM built exclusively for local governments that make up the patchwork of our country. Our team combines decades of experience supporting local government and solving for the unique challenges that it faces. Designed by engineers with a pedigree from industry leaders including MIT, Google, and nVidia, Polimorphic's solutions address the evolving expectations of today's constituents who demand accessibility, self-service options, transparency on resolution times, and the ability to find information quickly and accurately.

### **Understanding the Needs of Smaller Communities**

Through our understanding of the needs that cities under 25,000 residents have, Polimorphic has utilized a modular design philosophy that can digitize existing processes without needing to change the process itself. This approach is particularly relevant for communities like the Town of Freedom with approximately 6,200 residents, where adapting technology to existing workflows—rather than forcing workflow changes—is essential for successful implementation.

Founded in 2017 by CEO Parth Shah who was inspired by family members working in municipal government, Polimorphic emerged from a project for the City of Boston. Shah observed that the greatest bottleneck wasn't hidden in data points, but among front-line staff who relied on outdated software and post-it notes to handle complex resident inquiries.

### **Single System for Multiple Municipal Needs**

The breadth of what Polimorphic can handle is wide—from service requests to business licensing and permitting to internal complaint forms, there's very little



our system can't do. Creating these workflows doesn't require complicated infrastructure or implementation investments—a process can be up and running within minutes, meaning that if municipal services or workflows change, Polimorphic can adapt without requiring technical overhaul or staff retraining.

Polimorphic empowers municipalities to digitize and streamline all processes in a manner that is easy to understand and infinitely scalable. Users can decide if they want to make processes open to the public or limited to staff use (such as internal functions like requesting vacation days).

Our products work in synergy to provide the best experience for constituents without creating additional work for staff. Polimorphic's systems augment staff ability to ensure processes are done correctly every time, while reducing administrative load and menial tasks. This directly addresses the Town of Freedom's goal of leveraging technology to assist its three-person office staff and provide greater access to services for residents, particularly given the office's Friday closure.

## Identified Needs for Digital Modernization

### Identified Current Challenges

The Town of Freedom is grappling with several challenges as it evaluates new software to improve resident service delivery. A small team of just three full-time employees is responsible for managing all office operations, leading to overextension and bottlenecks in service. The town faces a high volume of inbound calls about services, applications, and permits - such as what's required, how to obtain them, and where to find information. Some of this confusion stems from a single, unclear universal building permit form that leaves residents uncertain about its applicability. Additionally, the town's manual processes—including paper forms, physical drop-offs, and the lack of online payment or application options—further compound inefficiencies.

These operational issues are exacerbated by an outdated website that is difficult to navigate and contains “too much” information, pushing more residents to call for help to receive immediate answers. Staff work hard but struggle with compiling reports due to inadequate data systems, making it hard to deliver the level of service they want to. Communication is also fragmented, with no centralized system to send mass updates or alerts, such as burn bans or plowing delays. Collectively, these pain points underscore the urgent need for modern,





user-friendly software that streamlines workflows, enhances digital services, and reduces strain on limited town resources.

### **Historical Pain Points**

The Town of Freedom has yet to implement technology systems such as a CRM, AI, or digital permitting, which has left them reliant on outdated and fragmented processes. As a result, the town has faced challenges such as missing or misplaced records—particularly during staff transitions or office moves—highlighting the need for better data continuity and secure digital storage.

In the absence of centralized systems, resident communications are handled manually, and there is no consolidated log of resident interactions or activities. This lack of digitization makes it difficult to ensure accuracy, maintain transparency, or track historical data effectively. Overall, these issues reveal a critical need for a cohesive, digital platform that streamlines operations, safeguards records, and supports consistent and reliable service delivery.

### **Current Process**

The Town of Freedom currently operates with heavily manual, paper-based workflows that create inefficiencies for both residents and staff. Residents seeking permits must navigate a confusing form, print it from the website, physically submit it at town hall or by mail, and then call to check on its status. These requests are then processed manually by staff using basic tools like spreadsheets and post-it notes, with payments accepted only by cash or check, as online payment options remain fragmented or unavailable. The reliance on physical forms and over-the-counter transactions makes even simple requests time-consuming and error-prone.

Due to limited digital self-service capabilities, the town experiences a high volume of calls from residents who are often frustrated by the website's poor search functionality, unclear navigation, and lack of confidence in finding accurate information. This leads many to default to calling staff directly, preferring a human response over a frustrating online experience. Staff and board members also struggle with limited access to data and analytics because relevant information is buried in paper files or scattered spreadsheets, making reporting tasks overly labor-intensive or even impossible. Historical records are inconsistently organized and difficult to access, especially after staff transitions. Communication with residents, such as issuing updates on burn bans or snow plowing changes, is



managed manually through one-on-one phone calls. Without a centralized digital platform or CRM system, there is no way to track resident interactions, permit history, or communication logs in a unified manner—further compounding inefficiencies and diminishing transparency.

## **Measuring Success**

Partnering with the right technology vendor offers the Town of Freedom a clear path to transformative outcomes across cost, efficiency, and service delivery. By automating manual workflows—such as call routing, permit applications, and payment processing—the town can significantly reduce the hours staff spend on repetitive tasks, resulting in meaningful cost savings. Intelligent form handling and automated systems would reduce errors, streamline processing, and ensure residents receive accurate, timely service. A modern platform would also support future scalability as the town's population and permitting needs grow, eliminating the need for multiple fragmented solutions.

A centralized, digital system would deliver better service to residents by enabling 24/7 access to information, online applications, and multilingual AI-powered assistance. This would reduce the volume of incoming calls while improving the accuracy and transparency of services. Additionally, eliminating redundant or underutilized point solutions and consolidating operations under one platform would help justify costs by avoiding future vendor sprawl and reducing labor-intensive processes. These improvements would also enhance the town's ability to meet board reporting requirements, with stronger data access and compliance trails. Ultimately, the town could expect faster application processing, a decrease in support requests, and improved communication—driving both resident satisfaction and internal performance.

## **Demonstrated Experience with Small Municipalities**

### **[Success Story from Bayside, WI.](#)**

The Village of Bayside implemented Polimorphic's solutions to address manual and cumbersome resident request systems. Their implementation of AI Search and digital workflows dramatically reduced walk-ins and increased efficiency for both residents and staff while providing 24/7 access to services. "Service demands are not getting any less, and saving time is saving money," said Andy



Pederson, Village Manager of Bayside. "Polimorphic helps us get ahead of the process. We're not losing paper or getting things shuffled around."

Almost immediately, Bayside saw measurable improvements:

- Previously, around 75% of requesters came into Village Hall. After implementation, almost all requests were submitted online, almost completely eliminating walk-ins.
- When applicants visited Village Hall, it took an average of 10 minutes to process them and an indeterminate amount of calendar time in delays while residents had to come to the offices in person.
- Contractors and residents gained the ability to access the system at any time, allowing them to submit permit requests and make payments outside of traditional business hours.

The system's transparency also provided users with real-time updates on their applications, reducing the amount of phone calls regarding simple status updates.

#### Expanding Service Availability Beyond Office Hours

One additional option that may be of interest and is denoted in this RFP is voice AI. To support the Surrogate's Office in Passaic County—an office managing Probate, Guardianship, and Adoption matters—we implemented an AI-driven solution designed for small teams and limited in-person availability. Facing challenges such as a high volume of after-hours voicemails (especially over weekends) and significant language barriers due to a diverse population, the office struggled to manage incoming questions and experienced "no-walk-in" Mondays as a result.

Our solution involved training an AI model on the office's unique processes and documentation, enabling it to handle a wide range of routine inquiries without staff intervention. We deployed an AI-powered voice line that operates during unstaffed hours—including weekends and evenings—and escalates to a human or voicemail only when a question cannot be resolved automatically. Additionally, we localized the AI's capabilities by integrating multiple languages, ensuring access for non-English-speaking residents.

This approach is particularly well-suited to organizations with small teams and non-standard operating hours. With just three staff members and Friday closures, the prospect can rely on the AI to maintain constituent access and reduce staff workload. In Passaic County, these enhancements resulted in more prepared residents during office visits and even enabled the office to re-open on Mondays due to the improved operational efficiency.



## Client List

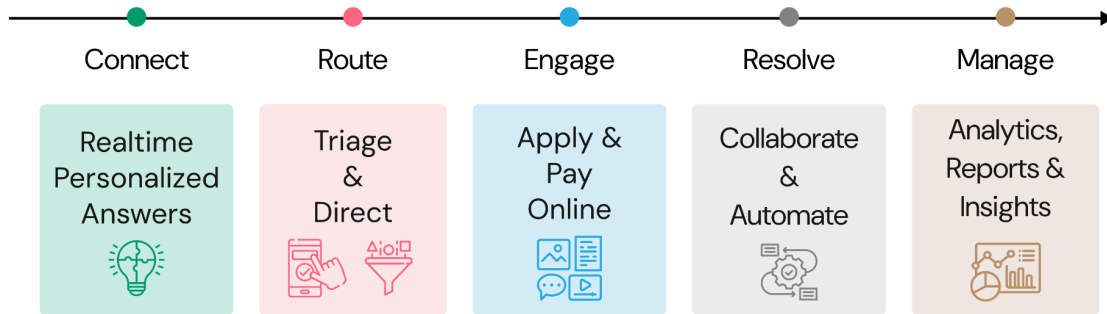
Polimorphic is the trusted partner for clients ranging in size from small towns, to larger cities and counties. Please note that due to privacy obligations and rapid expansion, we may not have all clients currently listed.

Craven County, NC	Suamico, WI
Gaston County, NC	Racine, WI
Haywood County, NC	Tyler, TX
Irmo, SC	WCMA
Lowell, NC	Harris County, TX
Polk County, NC	Burr Ridge, IL
Rowan County, NC	Bellbrook, OH
Rutherfordton, NC	Blue Ash, OH
Watauga County, NC	Hartford, WI
Burlington, NC	St. Joseph, IL
Pitt County, NC	South Milwaukee, WI
Longboat Key, FL	Omro, WI
Duplin County, NC	Amberley, OH
Morrow, GA	Brown Deer, WI
Cornelius, NC	DeForest, WI
Beaufort, SC	Greendale, WI
North Miami Beach, FL	Illinois City/County Management Association
Greenville, NC	Garfield, NJ
Palm Beach, FL	Passaic County, NJ
Upper Coastal Plains Council of Governments	Prospect Park, NJ
Florida Fish and Wildlife	Rochelle Park, NJ
Pineville, NC	Somerset, MD
Saluda, NC	Roanoke, VA
Bayside, WI	Alexandria, VA
East Troy, WI	Hunterdon County, NJ
Glencoe, IL	Monmouth County, NJ

polimorphic

Olathe, KS	Morris County Surrogate, NJ
Riverside, MO	Warren County, NJ
Wakefield, MI	Prince George County, VA
Waukesha, WI	Middlesex County, NJ
West Bend, WI	Newport, RI
Tangent, OR	Englewood, NJ
Tooele County, UT	Morris County, NJ
Vista, CA	Castle Pines, CO
Pacifica, CA	Littleton, CO
San Mateo County, CA	Nevada County, CA
Clallam County, WA	Eagle Mountain, UT

## Approach



## 1. Core Requirements

### 1.1 - Unified System

The Polimorphic platform delivers a unified system handling building permits, zoning approvals, and business licenses, and **all other** resident services through a single integrated solution. This eliminates the need for disparate systems and creates a central hub for all use cases.

Our solution enables the digitization of any existing or new processes without requiring changes to the processes themselves. This adaptability is crucial for handling the diverse requirements of building permits, zoning applications, and business licenses while maintaining consistency in user experience. The platform can be quickly configured to match your existing workflows rather than forcing staff to adapt to rigid software architecture commonly found in other CRM solutions.

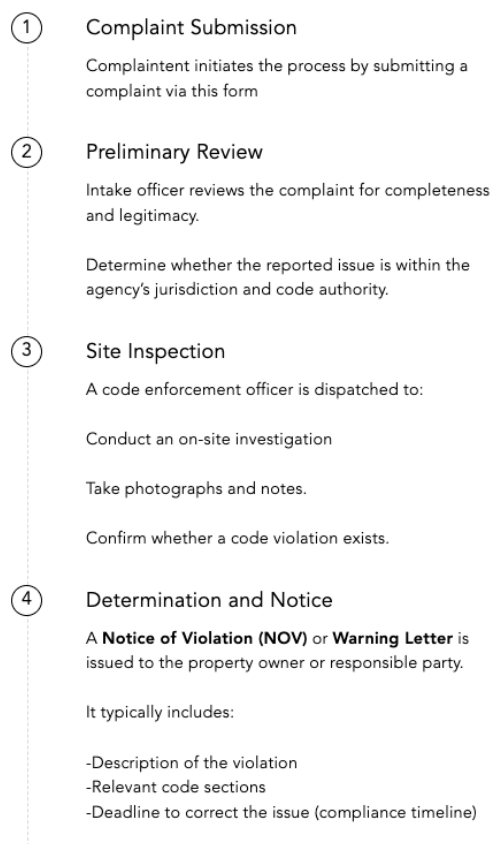
For small municipalities with limited staff resources, this unified approach provides significant benefits:

- A centralized repository of all casework and payments enables your three-person staff to support each other without the extra administrative

burden of traditional record keeping, and scales up easily in the future when new staff may be hired.

- The system empowers constituents to self-service many of their needs day or night, without requiring calls or emails during business hours - especially important given your Friday office closures
- Digital workflows can be implemented within minutes, allowing rapid adaptation to changing municipal services without technical overhauls or staff retraining

Through this unified system, both residents and staff benefit from enhanced transparency. Let's consider a permit application example: before beginning the process, applicants see a list of all steps they will go through, whether accessing via website or mobile phone. This transparency extends throughout the process, so constituents know what actions are happening behind the scenes and where their request stands on its path to resolution.



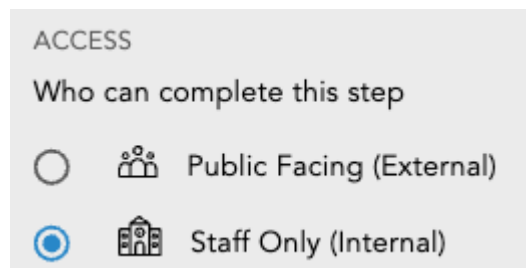


From service requests to business licensing and permitting, this unified solution handles the breadth of municipal processes without requiring constituents to create accounts while exceeding the federally mandated Digital Accessibility and WCAG 2.1 AA standards. The system's flexibility means it can adapt to the Town's evolving needs without requiring additional software investments or disruptions to operations.

["The flexibility of Polimorphic's platform has been invaluable... they've always been willing to think outside the box to meet our needs. Their support has been instrumental in helping us serve our community." - Marche Pittman, County Manager of Polk County NC](#)

## 1.2 Workflow Automation

For both residents and staff alike, these processes are designed to walk users through exactly what every case needs, meaning that nothing is ever lost in the shuffle, and staff don't have to worry about memorizing steps to resolution. The system empowers the Town to digitize and streamline all processes in a manner that is easy to understand and infinitely scalable. Staff can decide if they want to make the process open to the public, or if it's something they want only staff to fill out (i.e., an internal function)



The platform handles AI-driven status updates and notifications, increasing transparency for residents. Polimorphic solves common frustrations by adding additional transparency into the process, so constituents know what steps might be happening behind the scenes, and where their request is on its path to resolution.

These streamlined workflows reduce staff administrative load and eliminate bottlenecks, particularly beneficial for the Town of Freedom's limited office staff. Polimorphic aims provide the best experience for constituents, but not at the expense of additional work for staff, as it makes certain that processes are done right every time, while reducing administrative load and number of menial tasks to





be done, resulting in an enhancement of the Town's ability to serve its constituents.

The impact of these automated workflows is significant for small municipalities like the Town of Freedom. With only three office staff handling all town-related business and Friday office closures limiting resident access, our AI-driven workflow automation provides:

- 24/7 access for residents to submit and track applications outside of traditional business hours
- Automated guidance through application processes, reducing errors and resubmissions
- Real-time status updates that decrease phone calls and walk-ins regarding simple status checks
- Consistent application of rules and requirements across all submitted applications

These benefits directly address the Town's need to leverage technology to assist staff and provide greater access to services to residents despite significant staffing limitations. The combination of AI-driven workflow automation and streamlined processes ensures that both residents and staff experience an optimized permitting and licensing system that makes the most of limited resources while expanding service accessibility.

["We've seen a significant reduction in paper based processes, as well as 70% time reduction in getting things done. It's just a matter of a click of a button and things are able to move to the next step. And you're able to respond to resident inquiries quicker in terms of forms and requests online" - Intashan Chowdhury, Former Borough Administrator, Prospect Park, NJ](#)

## 1.3 Integrated Payment Processing

Pay to  
City of Morphopolis

Operator License	\$40.00
Third-Party Payment Processing Fee	\$1.90
<b>Total</b>	<b>\$41.90</b>

**Credit Card** ACH / E-Check

Card number  
1234 1234 1234 1234

Expiration date  
MM / YY

Security code  
CVC

Country  
United States

ZIP code  
12345

Pay Now

Polimorphic delivers a payment processing system that fully integrates with our permitting and licensing workflows, supporting multiple payment methods including credit/debit cards and ACH transfers. This seamless integration creates a frictionless experience for both residents submitting applications and staff processing payments.

After applicants progress through the required steps of any workflow—acknowledging rules, providing project descriptions, and adding e-signatures—they arrive at the final step: the application fee. Our platform's bill step can be incorporated into any process flow, allowing for automatic calculation of fees based on input parameters. For example, building permit fees might scale with square footage, while business license fees may vary based on business type or impact.

For the Town of Freedom, this integrated payment system provides significant advantages:

- 24/7 payment accessibility allows contractors and residents to submit applications and make payments outside traditional business hours, particularly valuable given your Friday office closures
- Real-time payment tracking and confirmation reduces follow-up inquiries about payment status



- The centralized repository of all payments eliminates the administrative burden of traditional payment record keeping, enabling your three-person staff to support each other efficiently

Payment processing is fully integrated with our unified CRM system, ensuring that staff can track both application status and payment status in one location. Before beginning any payment process, applicants see all steps they will go through, including payment requirements, whether accessing via website or mobile device. This transparency builds trust with constituents while reducing the time staff spend answering basic questions about payment amounts and methods.

The impact of integrated payment processing extends beyond mere convenience. As demonstrated by our implementation in other municipalities, we've seen dramatic improvements in payment efficiency with almost all applications and payments shifting online, reducing walk-ins by up to 75%. This shift frees your limited staff resources from processing in-person payments, allowing them to focus on higher-value tasks.

However, for residents who still prefer to pay in person via cash, check, or other methods, or in cases that a fee needs to be waived, Polimorphic supports the "old school method" by applying these in-person payments to the appropriate case, ensuring accurate record keeping and reconciliation in one place.

For the Town of Freedom, this means leveraging technology to assist your three-person staff while providing greater access to services for residents—exactly addressing your core requirement. The intelligent, integrated payment system works in harmony with our permitting and licensing workflows to create a seamless end-to-end experience that saves staff time while improving outcomes for constituents.

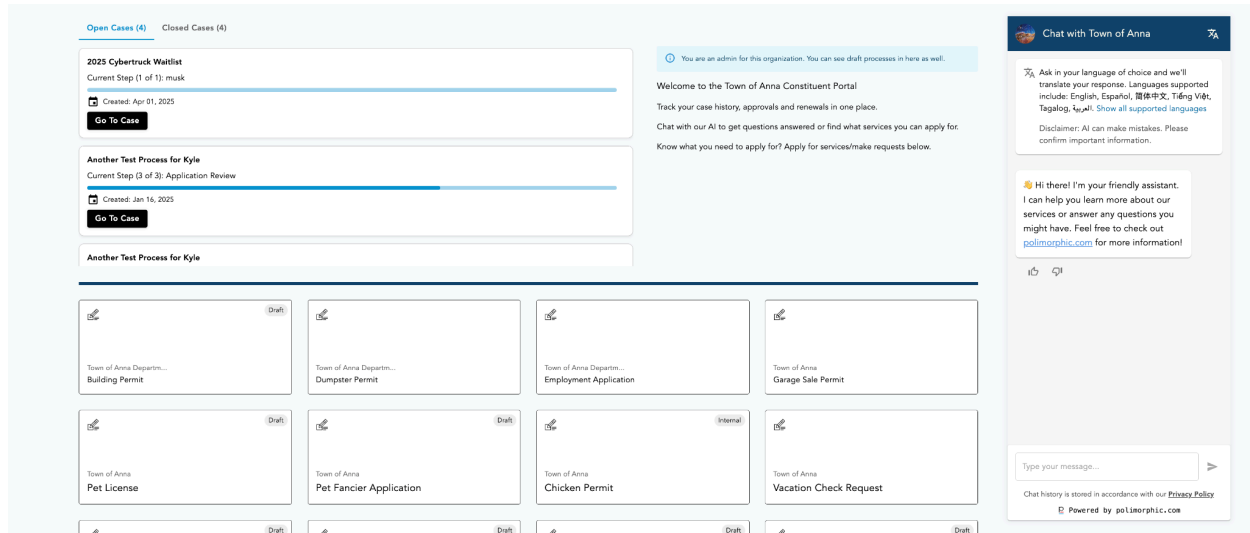
## **1.4 24/7 Public Portal**

Polimorphic historically handled "public portals" a bit more efficiently than legacy systems. Polimorphic instead sends an email tracking link to applicants that they can use to check status updates or previously submitted applications at any time. In addition, Polimorphic sends out status updates automatically as the Town processes different steps in the approval workflow.

However, with an upcoming product update rolling out a week after this RFPs due date, Polimorphic will have a Public Portal in addition to historical methods, that



will allow residents to see currently open applications, closed applications, or create any new applications. Residents will also have access to an AI chatbot that can walk them through unique requirements for any application.



Polimorphic empowers both residents and contractors to submit permit requests that reflect current online permit submission requirements 24/7, allowing them to handle town business on their own schedule. This capability directly addresses the Town's need to leverage technology to assist staff and provide greater access to services to residents despite staffing constraints.

Real-time transparency is built into the system, providing users with immediate updates on their application status via automated tracking emails or the portal. This visibility dramatically reduces phone calls and inquiries regarding simple status updates, freeing your limited staff to focus on higher-value tasks.

Polimorphic is also enhanced with AI capabilities that enable residents to self-service many of their inquiries day or night, without needing to call or email during business hours. This feature is particularly valuable for residents working on projects in the evening or weekend who need immediate answers about permit requirements or application status.

For the Town of Freedom, 24/7 access translates to:

- Fewer disruptions from walk-ins and phone calls about routine matters
- More consistent and complete application submissions
- Reduced paper handling and manual data entry



- Ability for staff to process applications during regular business hours without delays waiting for in-person visits
- Automated tracking updates and a “check here anytime” portal.

[“Service-first innovation in our organization is a mindset that is creative, objective, and collaborative. This approach is allowing us to expand access to 24/7 constituent services while our organization benefits from greater efficiency,” said Eileen Suhm, Administrator, and Chelsey Nagl, Utility Clerk of East Troy, WI](#)

## 1.5 Document Management

Polimorphic's document management system fully supports the Town of Freedom's unified permitting and licensing needs with robust capabilities for handling all standard file types required for building permits, zoning approvals, and business licenses. Our platform accepts and processes PDF documents, CAD files, images, and other standard formats, enabling residents and contractors to submit complete application packages digitally through our portal.



The system creates a centralized repository for all case-related documents, eliminating the administrative burden of traditional record keeping while maintaining proper documentation for compliance and transparency. This centralization proves invaluable when residents inquire about application status—if a constituent hasn't heard back on their request and calls in, any staff member can quickly access the complete documentation history rather than spending hours calling different departments for a status update.

Our upload functionality integrates seamlessly into any workflow process, allowing constituents to submit required documentation at the appropriate steps:

- Building permit applicants can upload architectural plans, engineering calculations, and site surveys
- Business license applicants can attach business plans, proof of insurance, and industry certifications



- Zoning approval requests can include property surveys, elevation drawings, and environmental assessments

When digitizing processes like home-based business applications, we collect contact information from the applicant while providing an upload portal for the general application and supporting documentation. The system also includes document validation capabilities that automatically verify submissions meet requirements before advancing to the next workflow stage, reducing staff time spent on manual validation.

For staff reviewing submissions, our platform enables efficient document handling with internal-only verification steps. We can set these steps so that only permitted Town of Freedom staff members can verify the information, with cases assigned to specific personnel based on document type and application category.

Document security remains paramount in our system design. All uploaded files are stored securely with appropriate access controls ensuring that sensitive data remains protected. Our document management walks users through exactly what every case needs, meaning that nothing is ever lost in the shuffle, and staff don't have to worry about memorizing documentation requirements for different application types.

For the Town of Freedom, this document management approach transforms the permit application experience—residents submit complete documentation packages digitally while staff access everything they need in one place. By digitizing all manual or paper processes through our CRM, we save staff time and improve outcomes while increasing transparency and building trust with the general public.

["Using Polimorphic, we are able to mirror the state's audit process by uploading documents at each step of the audit for each district. This allows subsequent reviewers to quickly verify the documents are present, rather than digging through files, expediting the review process." - Seth Derner, DSS QA Specialist for Gaston County, NC](#)



## 2. Additional Options

### 2.1 Automated Meeting Minute Generation

Currently, Polimorphic does not offer this service, however, meeting minutes generated by another platform, including but not limited to, Zoom or Avoma transcripts & summaries, can be utilized to train the AI model.

### 2.2 Resident Reporting Platform

Included within Polimorphic's day one offering at **no additional charge** is a powerful resident reporting platform specifically designed to address the Town of Freedom's staffing constraints while enhancing service delivery. Our solution provides a 24/7 avenue for residents to log general concerns, complaints, and public works issues, handling a wide variety of municipal service requests.

The system accepts service requests without requiring residents to create accounts, including adding images, videos, locations, or other necessary information. Location based requests are mapped out for the Town of Freedom, for use cases such as debris pickup or code enforcement for example. This flexibility ensures that every resident, regardless of technical ability, can easily report issues.

Our reporting platform adds transparency throughout the entire process, showing constituents exactly what steps are happening behind the scenes and where their request stands on its path to resolution. This visibility drastically reduces follow-up inquiries that consume valuable staff time, as residents can track progress in real-time rather than calling the office for updates.

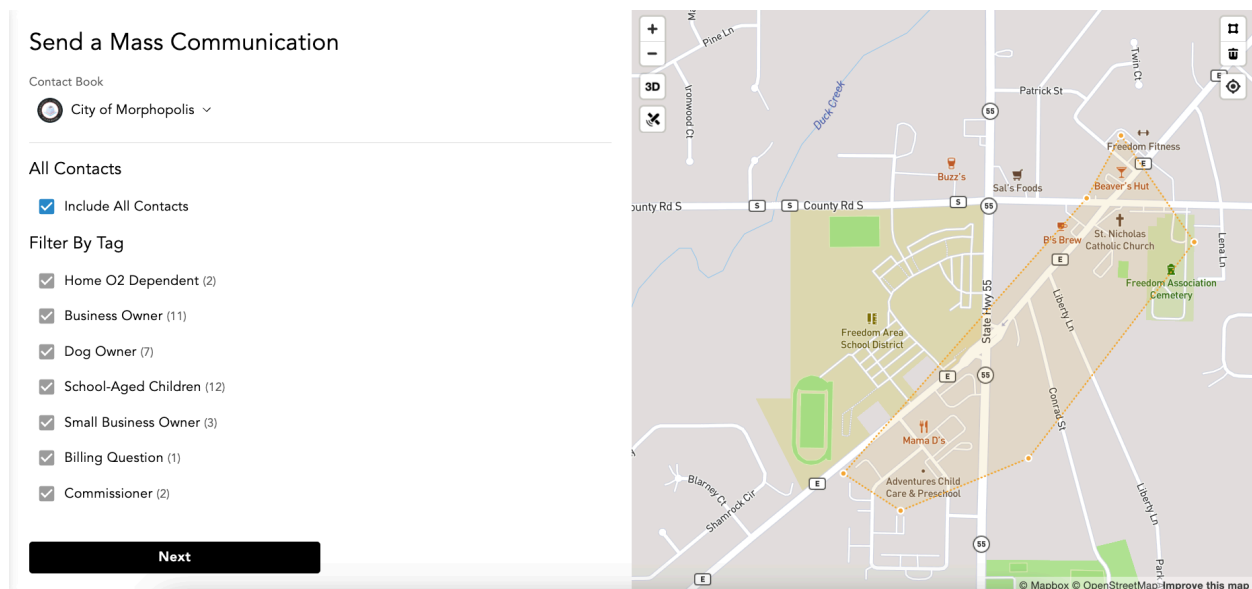
[As Andy Pederson, Village Manager of Bayside WI noted: "Service demands are not getting any less, and saving time is saving money. Polimorphic helps us get ahead of the process. We're not losing paper or getting things shuffled around."](#)

### 2.3 Proactive Messaging Features

Polimorphic is useful for constituents coming to find information or a municipal service, occasionally Freedom will need to proactively reach out to its residents for many different reasons. Email provides the greatest reach for the cheapest price, but many email tools can only send broad messages to everyone - leading to constituents tuning out due to irrelevant information and not participating in programs they qualify for.



Polimorphic solves this issue by providing mass mailing tools that can reach out to everyone, or segment outreach when appropriate by user tags or geofences. For example, if a bad storm affects homeowners and the city wants to roll out a remediation program for those affected - a historical challenge would have been contacting only the people affected, and not everyone on the mailing list. Polimorphic makes it easy to draw a shape around the affected area, and drill down further using desired user tags, to make sure the message only goes to who the user wants it to go to.



After confirming the recipient list, users can send out emails, form letters, attachments, newsletters, payment links, and more to the selected audience from their desired email domain.

Polimorphic uses emails within the system entered by constituents during case creation, and can also pull from existing email lists (such as an emergency management software) or a newslettering tool.

["\[Polimorphic\] kept us from driving every road daily" - Bobby Arledge, Emergency Management Director, Polk County NC](#)

**The Mass Communication modules are included within Polimorphic at no additional charge.**





## 2.4 AI Voice Line

Try it yourself\*!

Call  
**+1 651 615 2063**

**\*please note this demo was created only as a proof of concept, and is not indicative of the final product.**

One of the greatest limits to staffing has been personnel availability. Staff work incredibly hard during working hours (and often outside of them), but still need rest, sick days, time off, vacations and more. However, reality can occur outside of 9am-5pm and when constituents need assistance during that time with issues ranging from benign (permit questions) to immediate (emergency resources), reaching an answering machine can be at best a minor inconvenience, or at worst a major frustration.

Polimorphic provides an AI Voice Agent to augment staff call takers. Through a white-glove implementation, Polimorphic sets up a "voice AI Filter", that asks what the resident needs help with, and tries to handle simple questions before passing on to a human (routing by job responsibilities), 24/7, in over 20 different languages.

The outcome is that the caller can receive assistance for any issue that they have, no matter if the staff is busy or outside of normal working hours, the AI Voice Agent provides an additional resource for towns that are looking to support their constituents 24/7.

["I am excited to introduce this cutting-edge technology to our residents. The integration of AI is just another new means of providing accessible and responsive services to the residents of Passaic County. I believe this innovation will significantly enhance the user experience and facilitate communication between my office and the public." - Surrogate Zoila Cassanova, Esq., Passaic County, NJ](#)



## 3. Technical Specifications

### 3.1 Permitting

Try it yourself\*! Click the link - or copy paste the following into your browser:

<https://app.polimorphic.com/react/cases/pwy58zq4/apply>

**\*please note this demo was created only as a proof of concept, and is not indicative of the final product. Do not remit payment.**

#### Streamlined Electronic Plan Submission

Polimorphic's permitting system offers robust electronic submission capabilities that handle a wide variety of file formats essential for building permits, including PDF, CAD, image files, and other standard file types. Polimorphic can provide different application questions and criteria contingent on what the applicant is applying for, even with an universal permit, flagging potential issues before they reach staff review, dramatically reducing revision cycles and approval timelines.

As applicants submit plans through the system, they progress through customizable steps that mirror your current permit requirements, ensuring all necessary information is captured upfront.

["We had talked about trying to lower that barrier to entry, to put our \[staff\] first, as opposed to filling out paperwork. Since implementation, we've gotten the amount of homes that we licensed last year in just two months." - Seth Derner, DSS QA Specialist for Gaston County, NC](#)

#### Guided Digital Workflow Experience

Our permitting portal walks applicants through every required step of the process, whether they access the page via website or mobile phone. Before they begin, applicants see a clear list of all steps they will need to complete, setting proper expectations and reducing incomplete submissions.

We mix and match these steps 1:1 to your current process, recognizing that staff need different information for different permit types. The guided workflow ensures applicants provide all required documentation and information, significantly reducing staff time spent requesting additional materials after submission.



["\[Polimorphic\] allows us to be more efficient and spend our time elsewhere than correcting those data errors. The result is there's fewer errors being made because of the standards we have in the workflow that we're trying to keep," says Jerry Houghton, Recorder of Tooele County UT.](#)

### **Real-Time Status Tracking**

Our real-time updates adds transparency throughout the entire permitting process, showing applicants exactly what steps are happening behind the scenes and where their permit request stands on its path to resolution. This visibility drastically reduces follow-up inquiries that consume valuable staff time, as applicants can track progress rather than calling the office for updates.

Historically, if a constituent hasn't heard back on their request, they try calling in—however, if they reach a staff member different than the one processing their permit, they may not get a clear answer. This leads to frustrated constituents and overloaded staff who spend hours calling different departments for status updates while juggling their normal workload. Polimorphic eliminates this inefficiency by giving applicants direct visibility into their status.

### **24/7 Self-Service Options**

Recognizing the Town of Freedom's Friday office closures and limited staffing, Polimorphic includes 24/7 publicly accessible application options that answers questions about permits, municipal codes, applications, and more. After answering questions, Polimorphic empowers applicants to submit their paperwork as well, no matter the day or time. This accessibility allows contractors and residents to submit permit requests and make payments outside of traditional business hours.

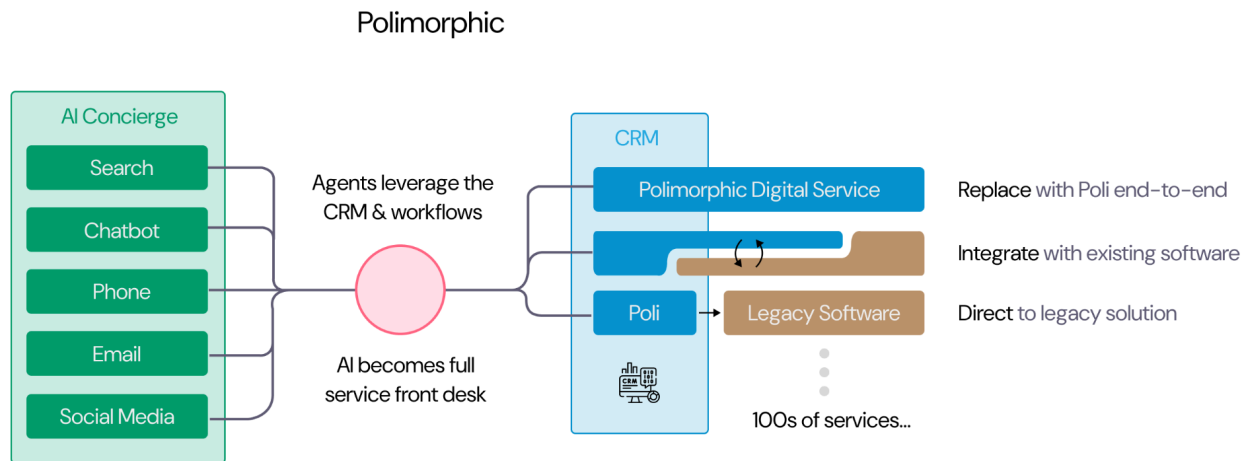
["We've seen a reduction in inquiries about things like field and community room reservations. That used to be a major source of calls and emails, and now residents are able to easily find that information on their own." - Camden Bender, Communications Director, Castle Pines CO.](#)

## 3.2 AI & CRM

Try it yourself\*! Click the link - or copy paste the following into your browser:

[https://app.polimorphic.com/organizations/outagamie\\_county\\_wi.freedom/chat](https://app.polimorphic.com/organizations/outagamie_county_wi.freedom/chat)

**\*please note this demo was created only as a proof of concept, and is not indicative of the final product.**



### AI-Powered Chatbot for 24/7 Resident Support

Recognizing Freedom's limited staffing and hours of operation, Polimorphic's CRM includes AI chatbots that provide residents with immediate answers to inquiries at any time, day or night. Our AI chatbots serve as virtual staff members, helping residents navigate permit requirements, check application status, and receive deadline reminders without needing to call or visit town offices.

This capability has proven particularly valuable for municipalities with small staffs, as it ensures residents can access information and services even when offices are closed.

Staff often utilize the AI themselves, when looking up answers that may be found in the municipal code for example. By providing an immediate response, the time to resolve uncommon resident questions becomes near instantaneous.



["A resident wanted to add 600 square feet to their garage. I typed in the question, and boom—there was the answer. Instead of saying 'let me get back to you,' I could respond in seconds." - Brandon Hennes, City Administrator, Omro WI](#)

### **Natural Language Functionality and Training.**

Polimorphic's AI search allows residents to ask questions in natural language without needing to know specific terms or ordinances. The system pulls information from the Town's website, GIS, online processes, applications, and local ordinances to provide accurate answers with cited sources.

For example, if residents are working on a home improvement project in the evening or the weekend and want an answer instantly, AI can provide specific information based on what their property is zoned as. AI allows residents to ask a question - no need to know specific terms or what ordinance to search in - and receive an answer with the sources cited. If there's an online application on the website, it helps residents apply online.

### **Automated Deadline Reminders**

Polimorphic integrates automated deadline reminders throughout the workflow to ensure permit timelines are met. The system tracks progress and automatically notifies both applicants and staff of upcoming deadlines, reducing the risk of missed inspection dates or expired permits.

These reminders are configured to match your existing processes, as we can mix and match these steps 1:1 to the current process, as staff may need separate information for different types of applications.

["It has gotten a lot easier to ensure consistency and make sure that people are following the process daily." - Jeremy Gregg, 911 Director, Polk County NC](#)

### 3.3 Compliance

["It's been a huge win for the city. Everything is digitized and date-stamped, making the process straightforward and efficient." - Joe Samaniego, City Manager, Tangent, OR](#)

#### Inspection Scheduling

Polimorphic's compliance tools integrate manual inspection scheduling tied directly to permit timelines, ensuring regulatory requirements are met without increasing administrative burden on Freedom's limited staff. The system creates inspection milestones based on permit type and automatically assigns them to the appropriate town staff member.

With Freedom's three-person administrative team handling all town business, our automated scheduling eliminates manual tracking processes that often lead to missed inspections or delayed permits. The system methodically walks both staff and applicants through required inspection steps while maintaining a complete digital record of the compliance process.

#### Built-in Service Level Agreements

Our compliance module includes configurable Service Level Agreements (SLAs) that serve multiple purposes within the permitting workflow. SLAs communicate clear timelines to constituents so they know exactly how long certain inspection steps take, while also providing internal benchmarks to measure staff performance.

These automated SLAs align perfectly with Freedom's goal of leveraging AI-driven workflow automation for application review and status updates. The system automatically alerts staff when inspection deadlines approach, preventing bottlenecks and ensuring consistent processing times regardless of office closures or staffing limitations.

#### Proactive Deadline Management

Polimorphic's compliance features include automated notifications and reminders about upcoming inspection deadlines. These reminders can be configured to match your existing processes, ensuring that both internal workflows and public-facing communications maintain consistency.

#### Performance Tracking and Accountability



Our system incorporates due date tracking for all permit-related inspections, allowing staff to measure performance against compliance requirements and create accountability. These trackable milestones serve as critical benchmarks to identify if inspection processes are getting bottlenecked or taking longer than anticipated.

For Freedom's small administrative team, this visibility helps distribute workload effectively and ensures that Friday office closures don't impact compliance timelines. The system's AI-driven workflow automation continually monitors inspection status, alerting staff to potential delays before they become compliance issues.

["Anyone \[authorized\] can go and look at those documents. For example, if the supervisor reviews it, assigns it to one worker, that worker goes out on leave, they can go pick up where they left off." - Seth Derner, DSS QA Specialist for Gaston County, NC](#)

### **Transparent Process Visibility**

Polimorphic adds transparency throughout the entire inspection and compliance process, showing applicants exactly what steps are happening behind the scenes and where their inspection requests stand on their path to resolution. This visibility dramatically reduces follow-up inquiries that consume valuable staff time, as applicants can track inspection status rather than calling the office for updates.

Historically, when constituents haven't heard about inspection scheduling, they try calling in—however, with Freedom's limited staff, they may not reach the person handling their permit. Polimorphic solves this by adding additional transparency into the process, so constituents know what steps might be happening behind the scenes, and where their inspection is on its path to completion.

### **3.4 Reporting**

["How many requests are we getting? What's the impact? We can now dig deep into the reporting and numbers, share them with Council and say why it's important," says Emily Jones, Tooele County UT.](#)

### **Real-Time Dashboard with Permit Status Tracking**

Assigned: Nav R
Open

Showing 0 - 24 of 24 cases
1

CASE DETAILS	CASE STATUS	PROCESS	CURRENT ASSIGNEE	LAST ACTION	NEXT DUE
<b>Winnetka - Code Enforcement</b> City of Morphopolis	Open Created May 14, 2025	Winnetka - Code Enforcement 0/7 Current Step (1 of 7): Complaint Submission	Nav R Your Turn	Today	May 14, 2025 Due Today
<b>Jackson County IL Liquor License</b> City of Morphopolis	Open Created Mar 10, 2025	Jackson County IL Liquor License 2/16 Current Step (3 of 16): Applicant Information	Nav R Your Turn	65 days ago	Mar 10, 2025 Overdue

Polimorphic's reporting module provides a real-time dashboard that tracks permit status throughout the entire application lifecycle, creating unprecedented visibility for both Town staff and residents. Our system adds transparency to every step of the permitting process, showing applicants exactly where their request stands on its path to resolution.

Before residents begin the permitting process, they see a list of all the steps they will go through, whether they access the dashboard via website or mobile phone. As applications progress, both staff and residents can monitor status in real-time, eliminating the information gap that typically exists between submission and approval.

["We have an office standard of a two-day turnaround for requests, but we're able to get to in half that time." - Emily Jones, Director of Operations, Tooele County, UT](#)



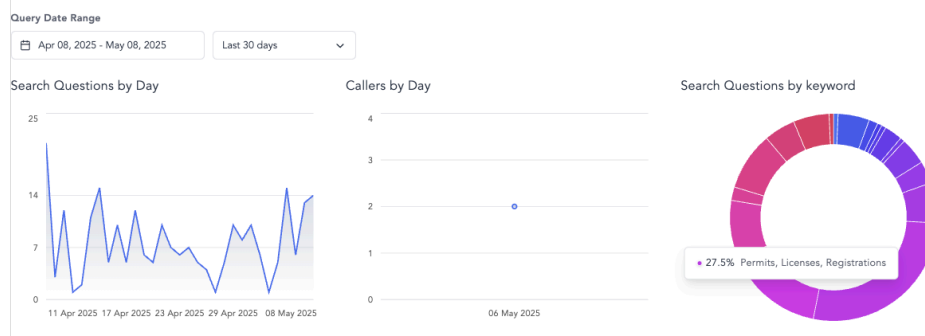
## Performance Measurement Through SLA Tracking

Step Name	Total Started	Total Completed	Percent Completed	Average Time To Complete
Applicant Information	148	128	86%	1 days, 12 hours, 52 minutes
Property Information	128	112	88%	4 hours, 31 minutes
Supporting Documentation	112	106	95%	16 seconds
Notice	106	104	98%	21 hours, 10 minutes
Approve Application	53	21	40%	15 hours, 15 minutes
Issue Permit	21	11	52%	5 seconds

Our reporting dashboard incorporates Service Level Agreement (SLA) tracking that serves multiple purposes within the permitting workflow. We can communicate SLAs to constituents, so they know how long certain steps take, or use them internally to measure staff performance. These SLAs function as benchmarks to see if processes are getting bottlenecked or taking longer than anticipated.

For Freedom's three-person administrative team, this functionality is essential for distributing workload effectively and ensuring that Friday office closures don't impact processing timelines. The reporting system automatically highlights permits approaching deadline thresholds, allowing staff to prioritize time-sensitive applications despite limited office hours.

## Usage Analytics and ROI Measurement





Polimorphic's reporting dashboard includes detailed analytics on system usage patterns, application volume, and processing efficiency. These metrics allow Freedom's administration to track improvements over time and demonstrate return on investment for the technology implementation.

These reporting features extend to the AI tools, so Freedom can know what the most frequently asked questions are, and how the AI is performing in terms of accuracy and user satisfaction.

### **24/7 Access for Extended Service Availability**

Our reporting dashboard is accessible 24/7 from any device. This always-on availability means residents or staff can check application status, review inspection requirements, and monitor deadlines even when Town offices are closed.

This capability addresses Freedom's need to leverage technology to assist staff and provide greater access to services to residents despite significant staffing limitations. The reporting dashboard essentially functions as a virtual staff member, providing transparency into the permitting process at any hour of any day.

## **3.5 Integration**

### **API Compatibility with Existing Systems**

Polimorphic's integration capabilities include Rest API (industry standard) compatibility with most existing systems, including major financial accounting systems, GIS, utility billing systems, etc. creating a seamless connection between Polimorphic and any data store.

Although Polimorphic sees no need for complex API integrations into other systems at this time, this is important future proofing for any sort of technology investment.

## Implementation Timeline

["Within 30 minutes, we had the form ready to go live... The collaboration and quick response were incredible." - Melissa O'Loughlin, Tax Administrator for Polk County NC.](#)

Polimorphic's implementation approach for the Town of Freedom ensures a complete rollout of all required functionality within a 6-month timeframe as specified in the RFP requirements, contingent on Freedom's willingness and ability to complete the limited milestone requirements needed from them. Our implementation methodology leverages our modular design philosophy, enabling rapid deployment without requiring Town staff to undergo significant retraining.

As demonstrated in our other municipal deployments, creating workflows in our system doesn't require complicated infrastructure investments—processes can be operational within minutes, meaning the Town can adapt services without requiring technical overhauls or staff retraining. This capability significantly accelerates implementation compared to traditional government software deployments.

The below schedule denotes a conservative estimate of a project of this scale. This may be subject to minor variation.

### Sample Implementation Schedule

Phase	Standard Timeline	Activities
Discovery & Planning	Weeks 1-3	<ul style="list-style-type: none"> <li>• Assessment of current permit and licensing processes</li> <li>• Documentation of workflow requirements</li> <li>• System configuration planning</li> </ul>

		<ul style="list-style-type: none"> <li>• Project plan finalization with Town approval</li> </ul>
Core System Setup	Weeks 4-5	<ul style="list-style-type: none"> <li>• Payment gateway integration setup</li> <li>• System security configuration</li> </ul>
Workflow Configuration	Weeks 6-12	<ul style="list-style-type: none"> <li>• Building permit workflow implementation</li> <li>• Zoning approval process digitization</li> <li>• Business licensing system configuration</li> <li>• Workflow automation implementation</li> <li>• Set up public portal</li> </ul>
Testing and Refinement	Weeks 13-16	<ul style="list-style-type: none"> <li>• User testing with Town staff</li> <li>• Workflow adjustment based on staff feedback</li> <li>• End-to-end process validation</li> <li>• Payment processing verification</li> <li>• System performance optimization</li> </ul>

Staff Training	Weeks 16-18	<ul style="list-style-type: none"> <li>• Additional Training sessions</li> <li>• Process-specific training for permit staff</li> <li>• Documentation provision</li> <li>• Training for handling resident questions</li> </ul>
Public Launch	Weeks 19-20	<ul style="list-style-type: none"> <li>• Resident portal soft launch</li> <li>• Public communication materials</li> <li>• System monitoring and adjustment</li> <li>• Support for initial resident submissions</li> <li>• Feedback collection mechanism implementation</li> </ul>
Adjustments and Refinement	Ongoing	<ul style="list-style-type: none"> <li>• Polimorphic provides additional white glove services and maintenance for the lifetime of Freedom's relationship with us at no additional cost</li> </ul>

## Training

### Staff-Focused Learning Approach

Polimorphic's training program is specifically designed for small municipal teams like Freedom's three-person office staff, recognizing their limited time and high workload. Our training methodology focuses on practical, role-based instruction that enables staff to immediately apply new knowledge while minimizing disruption to daily operations.

For each team member, we provide targeted training sessions focused on their specific responsibilities within the permitting and licensing workflows:

- Administrator: System configuration, workflow management, and reporting capabilities
- Clerk/Treasurer: Payment processing, financial reconciliation, and record management
- Deputy Clerk/Treasurer: Application review, status updates, and resident support

Our systems augment staff ability to ensure processes are completed correctly every time, while reducing administrative load and menial tasks, resulting in an enhancement of the Town's ability to serve its constituents despite limited staffing resources. This approach acknowledges the office's Friday closure and provides tools for staff to manage workflow efficiently within their four-day schedule.

["The process was seamless. The team is the experts, and I turn to experts when I don't know something. They took it step by step, defined what success looked like, and were extremely professional and flexible." - Brandon Hennes, City Administrator, Omro WI](#)

### AI-Powered Knowledge Transfer

Training will cover Polimorphic's AI-driven workflow automation capabilities, enabling staff to quickly access information and reduce reliance on institutional knowledge. As demonstrated in our Bayside implementation, ["AI Search provides a user-friendly experience to navigate the website's content and knowledge, used internally by staff and externally by residents. With the institutional knowledge lost with retiring employees, AI has been a way to fill in the gaps."](#)



For Freedom's small team, this capability is particularly valuable when staff members are unavailable or during transitions, ensuring continuity of service regardless of which staff member is responding to inquiries.

### **Resident Training and Support**

Our resident training program focuses on enabling self-service in Polimorphic.

Before residents begin any process in the system, they see a complete list of all the steps they will go through, whether they access via website or mobile phone. This transparency is reinforced through training, showing residents how to track their application status without needing to call or visit town offices.

Based on outcomes from similar deployments, this approach dramatically reduces walk-ins and phone inquiries. ["The processes are super user-friendly, both for residents and staff. They've been very easy for everyone to adapt to," says Emily Jones, Director of Operations of Tooele County, UT.](#)

### **Training Delivery and Resources**

Our support services starts with implementation and training support, with ongoing support handled via teleconference, phone, or email. Freedom will enjoy a dedicated customer success manager supporting their account, with standard availability being Monday through Friday 9am CT - 5pm CT for routine issues, and 24/7 for urgent support.

Outside of dedicated staff resources, users who wish to self service their issue will be provided full online help & support documentation, quick reference guides, and video instructions for common user tasks. Polimorphic also utilizes an additional AI assistant for answering user support questions that is available 24/7, though the AI assistant does not take the place of any human support that Polimorphic offers at no additional charge to what's denoted in the cost portion of this RFP.



## Cost

["The challenge is that the cost of services is rising faster than our growth. That's why tools like Polimorphic matter—they help us do more with the team we have." - Brandon Hennes, City Administrator, Omro WI](#)

### 5-Year Total Cost of Ownership

Polimorphic is committed to providing transparent, predictable pricing that enables the Town of Freedom to effectively budget for both immediate implementation costs and ongoing operational expenses. Our pricing model is designed to be straightforward, with no hidden fees or unexpected charges, making it ideal for municipalities with strict budgetary constraints and limited administrative resources.

<b><u>Component</u></b>	<b><u>Year 1</u></b>	<b><u>Year 2</u></b>	<b><u>Year 3</u></b>	<b><u>Year 4</u></b>	<b><u>Year 5</u></b>	<b><u>5-Year Total</u></b>
CRM Platform License (up to 5 Users)	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000
AI Search & Chat	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$30,000
Implementation	\$0	\$0	\$0	\$0	\$0	\$0
Staff Training	\$0	\$0	\$0	\$0	\$0	\$0
Payment Processing	\$0	\$0	\$0	\$0	\$0	\$0
Technical Support	Included	Included	Included	Included	Included	Included
System Updates & Maintenance	Included	Included	Included	Included	Included	Included





Proactive Messaging	Included	Included	Included	Included	Included	Included
<b>Bundle Discount</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>
<b>Annual Subtotal</b>	<b>\$12,000</b>	<b>\$12,000</b>	<b>\$12,000</b>	<b>\$12,000</b>	<b>\$12,000</b>	<b>\$60,000</b>
<b><u>Optional Components</u></b>	<b><u>Cost</u></b>					
Additional CRM Users	\$2,000/ User Per Annum					
AI Voice Line (per 5,000 calls)	\$5,000					
Other Integrations*	Up to \$15,000					

\* At the time of this response, Polimorphic believes no other integrations will be necessary, and has only included this line item in the spirit of full pricing transparency.

### Detailed Cost Breakdown

The following breakdown provides detailed information on short-term implementation costs and long-term operational expenses, allowing for transparent budgeting and planning.

Component	Description	Per Unit Cost Annually
Implementation	Discovery, planning, system configuration,	\$0

	and workflow setup for Polimorphic	
Core Platform License	One User annual subscription for unified CRM system handling building permits, zoning approvals, and business licenses with document management and payment processing  (minimum 5)	\$2,000 per user  (minimum 5 for \$10,000)
Staff Training	Comprehensive training program for Town staff, including hands-on system training, administrative configuration, and role-based workflow training	\$0
AI Search & Chat	Configuration of AI Search bar or chatbot, with uncapped usage	\$6,000
Payment Processing	Configuration of payment gateway for processing credit/debit cards and ACH transfers, and annual support and updates	\$0
Technical Support	Unlimited support from dedicated customer success representative, and access to self service support options	\$0



System Updates & Maintenance	Ongoing platform updates, security patches, and feature enhancements	\$0
AI Voice Line	AI Voice line available as an initial intake filter, menu option, on hold option, after hours line, etc.	\$5,000 per 5000 calls processed.
Proactive Messaging	Unlimited proactive email messaging to residents whose data is stored within Polimorphic.	\$0
Other Integrations	At the time of this response, Polimorphic believes no other integrations will be necessary, and has only included this line item in the spirit of full pricing transparency.	Upto \$15,000 per integration contingent on scope and complexity



## Policy for Handling Town's Sensitive Data

### Data Security and Privacy Standards

Polimorphic commits to upholding the highest standards of privacy and security for our clients and their constituents. Our company's purpose is to foster trust between constituents and government organizations by building software that increases transparency and accessibility.

Because airtight security is integral to our mission, we use industry-standard encryption protocols, build highly secure infrastructure, and practice tight organizational security. We also understand that security is a never-ending process, and we are continually upgrading our security practices to better serve our clients and communities.

Constituent Data: Subscriber acknowledges that Polimorphic's collection, use and disclosure of Constituent Data is and shall be governed by Polimorphic's privacy policy available at: <https://www.polimorphic.com/privacy-policy>, as may be updated by Polimorphic from time to time.

Data backups are made daily on the production database for client data recovery purposes. Currently, these backups are disposed of within seven days.

Using AWS ELB, we load balance network requests to our servers to maintain high availability. Our server infrastructure can handle upwards of 1000x common usage requests per second to prevent denial of service for our clients.

All data in transit is strongly encrypted. All requests are sent securely using TLS 1.2 protocols, AES256 encryption, and SHA2 signatures. Passwords are salted and hashed, preventing rainbow table attacks. User tokens are 256-bit and hashed when stored on the database. For data access, we maintain an advanced permission check system. The permission system grants data access to those explicitly given access rights through our system, enabling secure identity and office role management.

Polimorphic monitors its firewalls with AWS GuardDuty. All AWS EC2 instances have network ACLs or security groups attached. Public SSH to EC2 instances is blocked for additional security measures.

We limit access to servers via AWS private keys. Both production and development database access is restricted to the core engineering team. In the future, production database access will be restricted to servers only, and the core



engineering team will only be able to access the development database. Personally-identifying information is not provided to the development environment (the development database does not pull PII from the production database).

To minimize risks of organizational access and exposure, we adhere to least privilege principles. Employees and Polimorphic services are only authorized to access the data they must be able to handle in their work capacity. Access is reviewed at-minimum every quarter. We require personnel to use an approved password manager when creating credentials for organizational access. Password manager requirements help avoid weak passwords, password reuse, phishing, and other credential-related risks.

Currently, Polimorphic conducts quarterly security audits of the codebase. These audits focus on data access methods and ensure that security is ensured by every API request or remote procedure call, preventing data access attacks conducted by circumventing application code.

Polimorphic also has received SOC 2 Type 2 compliance and can provide an audit on request.

### **Data Transfer Upon Service Discontinuation**

Should the Town of Freedom elect to discontinue services with Polimorphic, we maintain a structured data transfer protocol that ensures:

- All Town data is exported in industry-standard formats
- Complete transfer of all documents, records, and historical files
- Secure transmission methods using encrypted file transfer protocols
- Verification process to confirm successful data migration
- 90-day post-termination access to data via read-only portal while migration is completed

Following service termination, Polimorphic implements a secure data destruction process that permanently removes all Town data from our systems after confirming successful transfer, adhering to NIST standards for data sanitization.

This approach ensures that sensitive information remains protected throughout the entire workflow while still enabling the transparency and accessibility needed for effective municipal operations.

**Additional information or audits are available on request**



## References from Similar-Sized Municipalities

Polimorphic has successfully implemented our CRM and workflow solutions in countless public entities across the United States, with a specific focus on municipalities facing challenges similar to the Town of Freedom. The following references highlight our track record of success with small municipal governments in Wisconsin that deal with limited staff resources, growing service demands, and the state tax levy limits.

### **Village of Bayside, Wisconsin**

Population: 4,369

Product Suite: AI & CRM

Point of Contact: Andy Pederson, Village Manager, [apederson@baysidewi.gov](mailto:apederson@baysidewi.gov)

### **City of Omro, Wisconsin**

Population: 3,623

Product Suite: AI

Point of Contact: Brandon Hennes, City Administrator, [bhennes@omro-wi.com](mailto:bhennes@omro-wi.com)

### **Village of East Troy, Wisconsin**

Population: 4,707

Product Suite: CRM

Point of Contact: Chelsey Nagl, Utility Clerk, [cnagl@easttroywi.gov](mailto:cnagl@easttroywi.gov)

Or: Eileen Suhm, Administrator/Treasurer/CDA Executive Director  
[esuhm@easttroywi.gov](mailto:esuhm@easttroywi.gov)

**Issue Report:** Amending Class B Road Ordinance

**From:** Administrator Carlson

**To:** Town Board of Supervisors

**Date:** June 25, 2025

## **BACKGROUND**

Previously, the town included Vine Road as a Class B road for purposes of pursuing ARIP grant funding. The classification as a Class B road was required to be eligible for funding under the program. After not receiving funds through the ARIP program, we are pursuing funding through a different program, the Surface Transportation Program – Rural (STP-R). As part of that program, we will need traffic counts for the road and will be removing the Class B designation in order to accommodate collecting accurate traffic data.

## **RECOMMENDATION**

Make a motion to strike Vine Road from the Class B Road ordinance.

**TOWN OF FREEDOM  
ORDINANCE 2025-01  
AN ORDINANCE DESIGNATING CLASS B HIGHWAYS IN THE TOWN OF FREEDOM, OUTAGAMIE COUNTY  
WISCONSIN**

The Town Board of the Town of Freedom, Outagamie County, Wisconsin, has the specific authority under s. 349.15 (2), Wis. stats., to adopt this ordinance.

This ordinance, adopted by a majority of the town board on a roll call vote with a quorum present and voting and proper notice having been given, designates town highways as class "B" highways in the town as follows:

- A. The following town highways in the Town of Freedom are designated class "B" highways subject to the weight limits set forth ins. 348.16 (2), Wis. stats., unless increased by town ordinance:
  - 1. Weyers Road from CTH S to Vandenbrook Town line
  - 2. Maloney Road from CTH UU to Vandenbrook Town Line
  - ~~3. Vine Road from CTH E to Center Valley Rd~~
  - 4. Golden Glow Road from McHugh Rd to CTH J
  - 5. Vanden Bosch Road from CTH S to CTH J
  - 6. McHugh Road from Golden Glow Road to CTH UU
  - 7. Rock Road from CTH EE to CTH C
  - 8. Schroeder Road from CTH EE to French Road
  - 9. Center Valley Road from CTH EE to French Road
  - 10. Garvey Road from French Road to CTH C
  - 11. Lau Road from CTH N to Maloney Road
  - 12. Greiner Road from CTH J to CTH E
  - 13. Broadway Drive from French Road to Holland Road
  - 14. Holland Road from Broadway Drive to CTH O
  - 15. French Road from CTH O to Krueger Road
  - 16. Vine Road from CTH E to CTH J
  - 17. Center Valley Road from French Road to Pit Entrance (Quarry)
- B. The town chairperson, or his or her designee, shall place appropriate traffic signs on the above-described highways on or before the effective date of this ordinance.
- C. No person may operate any vehicle on the above-noted highways in violation of the weight limits set forth in s. 348.16 (2). Wis. stats. In accordance with § 349.17, Wis. Stats., heavy vehicles obtaining orders for supplies or moving or delivering supplies or commodities to or from any place of business or residence which has an entrance on such a street or highway may not be prohibited from using roads restricted under this section. This section shall not apply to trucks pumping septic or holding tanks, public vehicles, garbage/recycling haulers, and emergency vehicles. The Town Board requires that exempt haulers take every precaution within their power to protect the roads while traveling within the Town of Freedom. This exemption in no way reduces or limits liability for damages to Town roads for these exempted parties.
- D. Upon conviction for a violation of this ordinance, the violator shall pay a forfeiture consistent with Wis. Stats. 348.21 (3) plus the applicable surcharges, assessments, and costs for each



violation. Each trip in violation of this ordinance constitutes a separate offense. In addition, the town board may seek injunctive relief from a court of record to enjoin further violations.

This ordinance is effective on publication of posting or April 1<sup>st</sup>, 2025.

The Town Clerk shall properly post this ordinance as required under s. 60.80, Wis. stats.

Adopted this 26<sup>th</sup> Day of March, 2025.

Signed: Justin Schumaker

Attest: Dana Methyl

Posted to Website 3-27-25

**Freedom Fire Dept. monthly chiefs report**

**June 2025**

**May fire report- total calls ( 3 )**

**(incident types)**

(100) Fires – 0

(200) explosion, overheat – 0

(300) rescue, ems incident - 1

(400) hazardous conditions – 2

(500) service call – 0

(600) good intent call –0

(700) false alarm –0

(800) severe weather – 0

(900) special incident – 0

Mutual Aid given – 0

Mutual aid received – 0

Auto Aid given– 0

Items of note;

1. 13 members completed technician level confined space training. In 2024 Freedom FD applied for and won a grant totaling approx, \$13,000 from Firehouse Subs for the equipment required to perform confined space and technical rescue situations. That equipment is now in service as our staff is now trained to the proper level be able to respond to those types of calls,
2. Freedom FD also applied for \$5000 and were awarded \$3000 from Capital Credit Union for some additional nozzles. These nozzles use some new technology that we feel will help us on structure fire calls.

3. Freedom FD also applied for and was awarded approx. \$5000 from TC Energy for an additional thermal imaging camera.
4. Freedom FD received applications for 2 new members that came to us via the high school program. One is already an active member and the other is in the approval process at this time.

Thank you,

Respectfully submitted by

Mark Green – fire chief

Freedom EMS  
Department Report for  
Town Board Meeting Wed. 6/25/2025  
Submitted: Wed. 6/18/2025

EMERGENCY RESPONSE DATA:	<p>YTD total calls as of 6/18/25: 91</p> <ul style="list-style-type: none"> <li>• June 2025 MTD total: 3 calls (0 missed calls)</li> </ul> <p>May 2025 total: 15 calls (0 missed calls)</p> <p>YTD total calls as of 5/31/25: 87</p> <ul style="list-style-type: none"> <li>• Oneida – 5 (5.7%)</li> <li>• Country Villa – 19 (22%)</li> <li>• Missed calls – 1 (1%)</li> </ul>
24/7/365 RESPONSE GOAL:	<p>Ongoing goal is to have at least 1 person respond to every EMS call, 24/7/365</p> <ul style="list-style-type: none"> <li>• 0 missed calls since our previous Town Board report</li> </ul>
MEMBERSHIP:	<ul style="list-style-type: none"> <li>• We now have 11 members on our roster</li> <li>• We're always looking for new members</li> <li>• 1 new member just finished department orientation &amp; has started his probationary membership status</li> </ul>
RECRUITMENT UPDATE:	<ul style="list-style-type: none"> <li>• Giving out EMR/EMT course enrollment information to interested people as they inquire</li> <li>• Plan to update our department information on the town website</li> <li>• Plan to link our application to the town website</li> </ul>
AEDs:	<ul style="list-style-type: none"> <li>• Willing to hold CPR/AED class for DPW staff anytime soon.</li> </ul>
ADMINISTRATION:	<ul style="list-style-type: none"> <li>• Started paying EMRs for calls &amp; meetings in 2025. Introducing &amp; orienting staff to Workhorse payroll system. Going well.</li> </ul>
SPECIAL EVENTS:	<ul style="list-style-type: none"> <li>• Provided special event coverage with an EMS team at the following events: <ul style="list-style-type: none"> <li>○ Fri 5/30/25, Country Fest</li> <li>○ Sun 6/8/25, Breakfast on the Farm (J-Springs Dairy, N4182 Cty EE)</li> <li>○ No significant problems at either event, handed out a few band-aids</li> </ul> </li> </ul>
COUNTRY VILLA:	<ul style="list-style-type: none"> <li>• Ongoing meetings to enhance our working relationship.</li> </ul>
MASS CASUALTY INCIDENT (MCI):	<ul style="list-style-type: none"> <li>• Our members will attend a large-scale MCI training exercise with multiple agencies at Kaukauna in on Thursday 7/17/25 from 5:00 -9:00 PM</li> <li>• We will be covering other MCI training in our regular monthly continuing education training this summer</li> </ul>
COMMUNITY DISASTER PLAN:	<ul style="list-style-type: none"> <li>• Our community disaster plan is overdue for updating</li> <li>• Planning to start work on an update this summer</li> </ul>
FREEDOM SCHOOLS:	<ul style="list-style-type: none"> <li>• Deputy Cole VanBeek will keep us updated about the changing dynamics of responding to the school during the construction</li> </ul>

Submitted on 6/18/2025:

Roger Stanley, RN, CCP, NRP  
EMS Director  
Freedom EMS

## **June/2025 DPW Report**

- Mark Kortz came to the Town office and inquired about a driveway permit for parcels 0989 and 0994 that adjoin to Maloney road. Conducted a site visit with Mark, and found that there was a high point area that would work out best for adding 2 new driveways (1 on each side of Maloney Rd). The new driveways will be 60' in length and allow for large farm equipment to access the fields and not damage the road/shoulder. This will also allow the slurry boxes to be placed off the road while pumping sludge for vehicle safety. Mark will be removing 3 smaller existing driveways once this work complete.
- Maloney road from Greiner south to the town line has been reclaimed, shaped, and repaved by northeast asphalt. Driveway culverts and cross culverts were replaced from Greiner Rd. to Lau Rd.
- A property owner near Fox Meadows subdivision was concerned about the drainage/water impacts from this subdivision. Worked with McMahon engineering who provided the necessary documents and information to provide fact-based language to the property owner. The detention pond at Fox Meadows reduces the overall stormwater flow leaving the site and is now an 1/8<sup>th</sup> of the original flow. Setting up a time to meet with the property owner to discuss this information.
- Flags are installed around the town, prior to the holiday cut all grass and cleaned everything up.
- Missing a 6' section of fence behind diamond 3 on the park boarder, neighboring property owner was having problems with vandalism. Repaired the fence with materials that we had in stock and locked the gate in this area.
- Ordered 30 additional flag poles and brackets from eder flag to fill in the missing flags around town (Hwy 55 near VFW park). We have the flags from last year just ran short on poles and brackets, should now have a few on hand in case a couple break.
- Hired two summer park laborers, Gavin and Colby. In the process of onboarding.
- Onsite visit with a resident on Sharon Rose Court bordering Lions park, discussed possibly taking down a tree that was on the Lions park property (half of it fell down on the resident's property and the other half remains up). Also talked to the resident about a driveway permit and drainage concerns.
- Ordered the missing/remaining signs country fields subdivision, waiting for restoration work to be complete before installing signs.
- Country fields subdivision restoration work is complete, paving the roads this week. Marking out the locations for the address signs and street signs with installation work to follow.
- Removed old road millings from Park Ave. (soccer field entrance), had 4 loads of road material delivered and picked up 2 loads with our dump truck. Regraded the entrance road and parking lot and have the area ready for the grader to do their work. Grader and rolled regraded the parking lot and Parkway Lane.

- Installed wood chips around the new arborvitaes adjacent to the detention pond at fox meadows. Also using a generator and pumping the water out of the pond that supplies a soaker hose to water the trees as needed.
- Diamond 2 restroom drains plugged up again. The clean-out was repaired by the general contractor a week before this. Had speedy clean televise this line with the thought that dirt and gravel may have enter the line and restricted the drain again. The televising revealed that 50' away from the restroom the pipe has a dip/sag in it that is holding water. Knowing this we are going to pressurize the line and flush it out once a week. Long term this will be something that should be replaced. This is a 4" cast line that transitions to clay tile according to the televising.
- Change order to Diamond 1. Terminate the existing sewer line from diamond 2&3 and install a new one just outside of Diamond 1 with a new tie in to the sewer line. Currently the sewer right of way travels east and west through diamond 1 and allows for a connection. Thought is to do this work while the contractors are onsite and before the restoration work begins. Contacted the sanitary district, they will be locating the sewer line and the current tie-in from diamond 2&3. Peters concrete will be providing a bid for the work.
- Randercom along with a local locksmith is in the process of getting the parks area converted to a single key for all the locks along with key pads.
- Catching up on some facilities maintenance at the historical society, (uneven concrete, lighting concerns)
- Unable to supply water to the sprinklers at diamond 1 for the new grass/sod. Called Abitz water services to investigate the well operation. At some point the pressure tank was removed from the well system, reinstalled and now have a water supply. Have plans to utilize a master plumber this fall to install additional fittings to develop a SOP for winterizing the plumbing system. This is a complex system, trying to minimize freezing problems over winter.
- Received a quote from Abitz to replace the well pump (\$3400.00 parts and labor). This pump is currently 20-30 years old. The current agreement is that the Town provides the water for the sprinklers on Diamond 1.
- Stormwater utility locates, receiving 10-20 locates per day. The Town will need to invest into developing a GIS based mapping system of the Towns stormwater utility to efficiently handle the diggers hotline locate requests. Currently the Town has not done any locates since Steve left the Town 9 years ago. I am receiving the locates via e-mail and do not have an efficient way of handling them, if we need to use the as built plans this will consume a good portion of my day.
- Evergreen lane was repaved and had a new stormwater drain system installed last year. Removed fabric and about 6" of dirt that had accumulate since installation, regraded area to allow the sheet flow to access the catch basins.

- Stop sign at Greiner and Holland was knocked down by a vehicle over the weekend, Called in Reed who put up a temporary sign. Calling in a locate to install a new sign post. While at this location noticed that the stop sign on the north bound lane is in the road way, called in another locate and will be repositioning both of these signs the correct distance of the road.
- Received the new post hole digger for the mini-excavator.
- Schmidt Rd. near the fire station, the concrete contractors we using the lions park/fire station as a truck cleanout area and left concrete debris in the lawn area that we cut grass. Graded area with the min-excavator, trucked in 4 yards of topsoil with the Towns dump truck, and seeded with grass seed.
- A Tree on the Towns property fell down onto a residents yard at 3691 Sharron Rose Ct. A portion of this tree remained however, it was leaning badly into the Lions Park. Worked with the resident and removed the tree. The resident requested a portion of the tree for their own firewood use, which we left onsite.
- Work truck/snow plowing operations. A new work truck for plowing and salting is identified in the CIP for replacement in 2026. With this funding becoming available in January of 2026 there are concerns that purchasing a chassis, having a plow and our existing salter installed, emergency lights installed, and available for the 2026 snow season will realistically put the vehicle in service in February or March of 2026. Looking at the numbers our parking lot snow removal costs in 2025 have exceeded an average full time DPW operator salary and about double the cost of having the county plowing half of the Town. The DPW crew is fully staffed with 4 people with CDL licenses, if we can maintain a full staff I would recommend looking into possibly purchasing this truck prior to 2026 and shifting from contracting out the parking lots to plowing them with the DPW crew.
- The fire station parking lot has a drainage issue that is holding water on the parking lot and not allowing it to drain into the ditch, and also holding water in the road base which has caused some cracking in the new parking lot/road. The DPW operators removed material from the in slope to allow water to shed from the parking lot and cut in a ditch with 3" clear stone to channel the water off the parking lot and into the ditch. When we cut this ditch it looked like we broke a water main as water was finally able to drain out of the road base, this should prolong the life of this parking lot.
- Checked the operation of the ditch mowers and cut the field at the fire station parking lot. Started cutting Town road ditches with a goal of having them complete by July 4. We will be mowing 2-3 times each week to allow for the operators to be available for other issues that will need attention each week.
- Obtained some free mulch from D&D solutions and put this in the park playground areas and around the trees. Our mulch is not ideal for the playground area, waiting on more wood chips to complete the remaining playground areas.

- Facilities maintenance on the historical society to include; concrete expansion joint work, lighting work, new outlets for LED bulbs in the bell tower, general grounds work in the flower beds.
- VFW Hall maintenance to include new toilet parts, cleaned the windows, installed new ceiling fan parts, repaired drywall in the kitchen area.
- Contacted Asplundh tree service, they are doing work in the Town in the coming weeks and have agreed to deliver wood chips as we need them for the parks.
- The DNR permit for the Weyers road culvert was approved. With this approval we ordered the culvert pipe (10 weeks out) with a start date from the county for the last week in August. With the size of this pipe we will work out the logistics so that it is delivered when the hole is dug and it is ready to be put into the ground.
- The tree that was removed near diamond 1 had its stump ground/removed. This area was graded out and seeded for grass.
- Diamond 5 is staked out and moving forward.
- Discussed pricing with the county to grader patch Vine Rd. from HWY E to HWY S. Current prices are \$1665.00 per load which averages 200'. This would be about 50,000.00 for the entire 1.13 mile length. Based on road observation it looks like about half of the road will need work. Working with the county in identifying and marking the areas that will be grader patched.
- Installed 2 new stop signs at Greiner/Holland intersection.
- About half of the ditches in the Town are currently cut, (top cut)
- Onsite visit with a resident on Rose Garden Way for sump pump concerns. This area borders the east side of country fields subdivision. The storm water in this area used to go into what is now country fields. There is a drainage easement in both country fields and garden estates at the back of these particular lots. Explained to multiple residents how this area was configured for storm water. I will revisit the drainage easement before accepting country fields, in relation to maintaining the ditch grade and elevation.
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# APA-WI Court Case Summaries

Opinions decided in March-April 2025 that affect planning in Wisconsin.

## Wisconsin Court of Appeals

### [Dyersville Ready Mix Inc. v. Iowa County Board of Supervisors, 2025 WL 1078289 \(April 10, 2025\)](#)

#### **Topic**

Review of County Board Denial of Rezoning Petition.

#### **Summary**

The landowner had petitioned the County Board to rezone agricultural land to permit a quarry operation, as well as a conditional use permit for the same. The Town where the land was located recommended against rezoning, arguing that it was inconsistent with the Town's comprehensive plan. The County's Planning and Zoning Committee also recommended denying the rezoning petition based on the same inconsistencies. After a public hearing and comments in front of the County Board, the landowner's rezoning petition failed to get sufficient votes to pass, and the landowner's reconsideration request was implicitly rejected.

The landowner brought suit, claiming that the County Board improperly relied on the conditional use decision standards in denying the rezoning request. It claimed the board was "mandated" to grant the rezoning petition because the requested new zoning was similar to the parcel's current zoning, and that the denial violated the landowner's substantive due process rights.

The Court of Appeals dismissed the landowner's arguments. First, transcripts and minutes from the P&Z Committee and County Board meetings showed that both entities understood that the rezoning and conditional use permits presented specific issues to be evaluated, and that the County Board exercised its discretion in arriving at the same decision as the Town and P&Z Committee. The County Board, the court said, rested its denial on the determination that rezoning the parcel would not be consistent with the Town's comprehensive plan, amongst other points, and therefore could not be shown to have used improper decision standards. Second, the court determined that the landowner's "mandate" argument was without merit, because such an argument would eliminate a County's ability to consider the Town's comprehensive plan, or how such conditional uses would affect the Town's character, which was stated explicitly as an agricultural community. Finally, the court decided that the landowner's third argument was underdeveloped. Even if it was not, the agriculture-land rationale of the community had justification based on health, safety, morals, and general welfare of the interested community, and therefore was not a violation of the landowner's due process rights.

#### **Key Takeaway**

This case provides a very good summary of the scrutiny the Court of Appeals will give a County Board's rezoning decisions. The court will be highly deferential to the local municipality's

decision so long as the entity making the determination follows the proper steps and elements outlined in its governing documents. Keeping the comprehensive plan up-to-date is especially important if the municipality plans to use it as the basis for denying a rezoning petition.

## **United States District Court, Western District of Wisconsin**

**[Przychocki v. Kearns, et al., No. 24-CV-623-JDP, 2025 WL 1158395 \(W.D. Wis. Apr. 21, 2025\)](#)**

### **Topic**

Zoning Violation and Code Enforcement.

### **Summary**

A landowner in a commercially zoned area sought to renovate the property. City officials provided landowner applications for a site review, building codes, and local zoning ordinances. The City granted a temporary occupancy permit and a list of requirements for the final occupancy permit. The owner did not complete the requirements, and City officials visited the property, provided the owner with notice of code violations including using the property as a residence. The owner denied officials' request to inspect the property, so officials did a visual inspection from the public street. The City undertook additional meetings with the owner to bring the property up to code. The landowner refused. About a month and a half after the temporary occupancy permit expired, the City sent a letter noting the illegal use of a residence in a commercial zone and threatened legal action to enforce compliance with the zoning ordinance and building code.

The landowner brought suit against several City officials, claiming enforcement of the City ordinances and zoning was a violation of the owner's due process rights under the 14th Amendment, and the City officials' inspection from the street was a violation of the 4th Amendment protecting against illegal search and seizure.

The Court dismissed the landowner's claims. 14th Amendment claims are broken into procedural due process and substantive due process. For the procedural due process claims in the context of municipal property regulations, the only procedural process that is required is notice and an opportunity to cure the issue. Substantive due process requires only that the government regulations be rationally related to a legitimate interest, meaning they cannot be arbitrary or irrational. Building codes and zoning rules are not arbitrary or irrational, as without them, more buildings would catch fire, collapse, become unsightly, attract squatters, or cause environmental damage. Nor is it arbitrary or irrational for a City to impose zoning rules that limit residential use of commercial buildings." The Court also dismissed the 4th Amendment claims as a government action is a "search" only if it intrudes upon an area where an individual has a reasonable expectation of privacy, and surveillance from a public street, even for a lengthy period of time, is not a search because there is no reasonable expectation of privacy in an area plainly visible to the public.

## **Key Takeaway**

Landowners must abide by building codes and zoning ordinances; following procedural processes for notice and opportunity to cure issues provides adequate protection from due process allegations.

*The APA-WI Court Case Summaries are brought to you by Chris Smith, Attorney, and Samuel Schultz, Urban Planner, of Von Briesen, in collaboration with the APA-WI VP of Policy and Advocacy, Lewis Kuhlman. If you have questions or concerns, please contact Sam Schultz, [samuel.schultz@vonbriesen.com](mailto:samuel.schultz@vonbriesen.com), or Lewis Kuhlman, [kuhlmanl@cityoflacrosse.org](mailto:kuhlmanl@cityoflacrosse.org).*

**I. PENDING MATTERS REQUIRING PLAN COMMISSION / TOWN BOARD ACTION**

- A. Bruce Gonnering CSM, CTH C – Submitted to Outagamie County, awaiting submittal to Town.
- B. Kirk Schuh Special Exception – landscaping business

**II. OTHER PLANNING & ZONING MATTERS**

none

**III. PLANNING & ZONING RELATED LEGISLATION / COURT DECISIONS**

- A. Dyersville Ready Mix Inc. v. Iowa County Board of Supervisors

Following Town recommendation, County denied request for zoning change due to inconsistency with Town's adopted comprehensive plan. Although a municipality is not legally bound to approve an application when "consistent with" the comprehensive plan, it must deny when it is not. If denied for this reason, the decision is likely to stand in court.

An up-to-date comprehensive plan is essential.

- B. Przychocki v. Kearns, et al.

City enforced prohibition against residential uses in commercial structure following denial of right to inspect premises. Owner filed suit claiming "inspection from street" was violation of 14<sup>th</sup> Amendment protections. Court dismissed claim.

Property owners must comply with zoning regulations and building codes including right to inspect.



**Administrator Report**  
**Prepared for Town Board of Supervisors**  
**June 25, 2025**

## **LATEST UPDATES**

### **Future Agenda Items**

For the social media and communications policy, I had intended to have a draft policy for your consideration at this meeting. However, I decided to also incorporate AI use into the policy and require more time to research what is being used as a standard practice in other municipalities for AI-generated content and work. It is my intention to have a draft policy to you for the July meeting.

### **WTA Clerk College Training**

Dana and Rachel signed up for WTA's [Clerk College](#), a year-long training program designed for new and continuing clerks. There a mx of in-person and virtual training sessions on a wide range of topics beginning in July 2025 and sporadically until June 2026. This is another great opportunity for Dana and Rachel to learn more about the roles and responsibilities of the clerk position and network with others in their roles as well. I approved this training and continue to encourage staff to seek out opportunities for professional training and development.

## **WEEK OF 6-2-2025 and 6-9-2025**

### **WTA Clerk Bootcamp**

Dana and Rachel attended a Wisconsin Towns Association training in Peshtigo on Friday, June 13. The one-day training focused on the role of clerks in day-day functions like meetings, elections, creating reports, and financial information. Staff continue to seek training opportunities to improve their knowledge and skills in order to improve both personally and professionally.

### **WCMA Summer Conference**

I will be out of the office attending the Wisconsin City/County Management Association's Summer Conference in Sturgeon Bay. The Conference is June 25<sup>th</sup> through 27<sup>th</sup>, meaning I will not be able to attend the June Town Board meeting on the 25<sup>th</sup>. These events serve as a great networking opportunity and often provide unique insights into common or emerging issues in local government administration.

### **Fireworks Permits**

As Independence Day approaches, we have discovered issues with our Fireworks Permits. The town's ordinances are silent on these permits, despite the fact that we have issued them for some time now. In assessing the quality of the current permit, I believe it is missing information that is required to be on the permit under state statute 167.10. I have modified the form to address those issues, but we will likely need to address the larger issue of our ordinances making no mention of firework permits.



Also, the Town Chairman or their designee must sign off on the permits. Our old permits listed a laundry list of town officials. For our processing purposes, I've directed the Clerk to sign off on them and provide a copy to the Fire Chief. The Fire Chief, under town ordinances, can rescind or deny a firework permit if public safety issues are deemed present. Having the Clerk sign the paperwork ensures faster turnaround for residents rather than having to wait until the Fire Chief can sign and return the permit.

This is yet another example of our ordinances and past practices and their haphazard, fragmented nature. While staff continues to struggle with this problem, we also continue to deal with it as professionally and effectively as possible.

### **RFP Demos and Reference Checks**

Staff completed more RFP demonstrations with prospective vendors. We've now seen all of their services and have begun the assessment process. Dana and I will discuss the proposals we liked best and report our assessment to the Board at this month's meeting.

I've reached out to at least three references with each vendor and presented them with a series of questions regarding their experience with the vendor. I've received a fair number of responses to this point and hope to receive more next week.

### **Property Complaints**

We've recently received a number of complaints regarding rundown, blighted, or otherwise unsightly properties in town. The Town does not currently have a blighted property ordinance and has limited provisions regarding addressing blighted properties or those with accumulated junk or unkempt appearances. Some of these issues extend into the area of zoning and we have contacted Outagamie County on some of the issues. The majority of the time, the response from County Zoning is that the issue isn't significant enough to address or in their opinion does not meet any restriction or provision in the zoning ordinance.

However, the Town does possess the ability to send building inspectors or other officials to assess properties that appear dilapidated or in disrepair if suspected building code issues are at hand, creating concerns for public safety or health. I am working with Attorney Steckbauer on a process by which to handle these situations, drafting letters, who will do inspections, etc. This will likely be an ongoing issue in the Town.

### **Maloney Road/NE Asphalt Compliment**

We had a resident reach out to express their appreciation for the work being done on Maloney Road and the professionalism of Northeast Asphalt's workers in the area. They were very impressed by the communication and expressed her thanks to Northeast and the Town for the work done there. I made sure to pass along the compliment to our partners Dan Rammer of MSA and Fran Letter of Northeast Asphalt, as it is great to be able to share positive feedback on these types of projects.

### **School District Contract**

I've set up a meeting between School District representatives and myself and our DPW Foreman on June 23<sup>rd</sup> to discuss the renewal of our contract with the School District. The School District currently pays the Town \$3,000 for field use and another \$5,000 for a loan taken out for lighting. Our current agreement expired at the conclusion of the Spring athletic season this year.



Due to our recent agreement with the FAA and changes to the town's possession and use of equipment, it is likely the contract will need to be changed as the town will no longer be able to provide certain services it had been rendering by using FAA-owned equipment.

I will keep you informed of the discussions and how they are proceeding.

#### **VFW Contract Update**

Chairman Schumacher and I had met with several members of the VFW's leadership to discuss the 1964 contract between the VFW and Town. After those discussions, I was directed to put together some numbers for the VFW on what it costs the town to operate and maintain the VFW Building. I provided them with the numbers from last year's budget and presented a couple of options that we had discussed. I sent this to them this week and have not heard back from anyone on the matter at this point. I'm sure the VFW leadership would like to discuss the information with their members and get more input on how the organization feels it should proceed.

Once again, I will keep you updated as the process moves forward.

#### **Audit Update**

Dana and I, along with Adam from Baird, met virtually with our auditors this week to discuss the presentation of some of the town's financial information and how it should appear in the audit report. It was basically a stylistic discussion regarding how TID information should be broken down and displayed in their auditor report.

On a similar note, Adam is continuing to work through TID #2 financials and will be working with the auditors to compare figures and ensure data matches what the auditors are seeing. They will be collaborating on formal TID audits in October of 2025. As a reminder, Adam's intention is to have TID financials analyzed and put into a report to be delivered to the Town Board in August or September of this year. Once that happens, Adam and our auditors can begin their work auditing the TIDs.

#### **Vine Road STP Rural Funding**

Chairman Schumacher passed along his desire to see MSA submit our Vine Road project for the Surface Transportation Program (STP) 2026-2031 Program Cycle. I passed this along to Town Engineer Dan Rammer and he will be coordinating the effort to involve the town and county stakeholders in the process as well as looping in DOT at some point. We have a preliminary meeting scheduled next week between me, Dan, Chairman Schumacher, Joe Zellmer from the County, and our DPW Foreman to discuss the project and how to proceed from here.

As a reminder, the intent is for the Town and County to do a jurisdictional transfer of Vine Road and a portion of County O. Therefore, a collaborative and coordinated effort is required to ensure the roads are being repaired to each other's standards and being done on a similar timeline.

#### **FAA D4 Repairs**

During the Park Committee meeting, the FAA proposed to do some work to address issues with Diamond #4. They are paying for the work and want the town's blessing to move forward with the work. Believing it to be in compliance with the recently adopted agreement between the groups, I gave tentative approval, pending running it by Attorney Steckbauer. I did speak with the attorney, and he also felt it was



compliant with the provisions of the new agreement. I informed the FAA they may proceed with their planned work.

**B's Brew/Citizens Park Parking Lot**

B's Brew is looking to resurface the parking lot that hosts both their business and parking for Citizens park. They asked us if we would share the cost of the resurfacing with them, as we own a significant portion of the lot. They recently followed up on this and I requested they provide a broken down proposal for the work. I believe it would be both financially feasible and prudent for the town to contribute to this, as the full quote was presented at \$4,820, with the town only owing a portion of that, likely around half.



Park Committee Meeting: June 4, 2025 6:00pm

1. Call to order, roll call

Committee members present: Margo Fox, Joe Zellmer, Aimee Feltz      Absent: Paul Hermes

Also in attendance: Administrator Carlson, Lori Dallmann & Crystal Malenofski (FAA), Scott Murphy (Fastpitch Club)

2. Verification of Posting and Adopt Agenda - Motion made by Joe Zellmer, 2nd by Aimee Feltz

3. Open Comment (max. 15 minutes)

Lori Dallmann brought up appreciation for new handles on paper towel dispensers in VFW bathrooms. FAA is working in conjunction with DPW staff to help minimize vandalism in soccer bathrooms. Representatives are very thankful for DPW willingness to work in tandem to address concerns. They are doing an awesome job!

It is also noted and appreciated that attention is being given to the soccer parking lot.

Question was raised if Town would like FAA to work with an electrician to put D2 under-pavillion lighting on timer. FAA is willing to pay to have this work completed. Lori will work on proposal to bring to Town and will share with John of DPW.

4. Updates regarding VFW D1 project courtesy of MSA: 4 updates on agenda, along with sod is now down and installed and backstop net poles are now installed.

Scott Murphy (Fastpitch Club) asked if bleachers can be paid for directly from the Club rather than going through pay application. Recommendation is that the donation should be given directly to the Town to help cover the cost of the new bleachers.

Margo will ask Administrator Carlson to share the donation form with Scott of The Fastpitch Club directly to accept the \$25,000 monetary donation to go toward the section of bleachers.

5. Discussion and possible action on Lions Park building plan proposal by MSA

Dan Rammer reported the plan is not ready, will plan to have ready at August meeting.

Chad Reader has asked why this is not a design build? Margo has inquired with Dan Rammer and will have Administrator Carlson look into the benefits/risks of this and contact Chad Reader. Admin. Carlson will look into if this meets the Town procurement policy.

6. Tree donation from Krull family for planting at VFW Park - ideally to replace those cut down around D1. Certificate has been given to Administrator Carlson.

7. Park Committee mission statement finalization - The group finalized the following mission statement to guide committee discussions/decisions: *To enhance the quality of life for our community by providing accessible, safe and sustainable parks, trails, and recreational facilities*

8. Revision work of Town Park Ordinances

Copies of the existing ordinance were shared with committee members. Members agreed to review in advance of the next meeting and be prepared to discuss. Administrator Carlson will share pictures of current park signage with committee members.

9. Discussion and possible action on maintenance work on Diamond 4

Crystal M. (FAA) brought up concern of safety/playability of D4 for regrading of infield, foul territory, and transition areas. Looking to complete this work as soon as Legion season is done in early to mid-July.

Unanimous committee decision approving the work to be completed.

Administrator Carlson is under the assumption that this is able to happen within language of the agreement with the FAA but will double check with Attorney Steckbauer and get response to Crystal M. and Margo F. by June 18, 2025.

10. Adjourn at 6:45 Motion made by Aimee F. , 2nd by Joe Z.

**\*NEXT MEETING IS SCHEDULED** for Wednesday, August 6, 2025 at 6:00pm.

Future agenda items:

- a. Park ordinance discussion and possible action
- b. Lions Park building plan proposal (MSA) discussion and possible action
- c. VFW D1 project updates
- d. D4 update from FAA
- e. D5 update from FAA



# OUTAGAMIE COUNTY SHERIFFS OFFICE

Total CAD Calls Received, by Nature of Call in Zone

<u>Nature of Call</u>	<u>Total Calls Received</u>	<u>% of Total</u>
911 Misdial	20	5.01
Abdominal C-Charlie Response	1	0.25
Vehicle Accident	2	0.50
Accident in a Parking Lot	1	0.25
Law Alarms - Burglary Panic	3	0.75
Animal Bite	3	0.75
Animal Call	6	1.50
Assist Citizen or Agency	26	6.52
Battery	1	0.25
Business Check	3	0.75
Civil Matter Assist	1	0.25
Civil Process	2	0.50
Crime Prevention	108	27.07
Diabetic Issue D-David	1	0.25
Disturbance	4	1.00
Domestic Disturbance	1	0.25
Falls A-Adam Response	1	0.25
Wire Down	2	0.50
Follow Up	6	1.50
Jail GPS Checks	22	5.51
Harassment	3	0.75
Hazard in Roadway	3	0.75
Juvenile Complaint	2	0.50
Vehicle Lockout	1	0.25
Lost or Found Valuables	1	0.25
Motorist Assist	1	0.25
Noise Complaint	1	0.25
Ordinance Violation	3	0.75
Parking Enforcement	1	0.25
PNB B-Boy Response	1	0.25
Reckless Driving Complaint	3	0.75
Restraining Order Tracking	4	1.00
Scam	1	0.25
School Safety	20	5.01
Sick A-Adam	3	0.75
Sick D-David	1	0.25
Stroke C-Charles	1	0.25
Suspicious Incident	6	1.50
Suspicious Vehicle	2	0.50
Theft Complaint	1	0.25
Traffic Enforcement	72	18.05
Traffic Stop	47	11.78

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<u>Nature of Call</u>	<u>Total Calls Received</u>	<u>% of Total</u>
Transport Accident D-David	1	0.25
Trespassing	1	0.25
Unconscious D-David	1	0.25
Welfare Check	4	1.00

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Total reported: 399

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**Report Includes:**

All dates between `00:00:01 05/01/25` and `23:59:59 05/31/25`, All nature of incidents, All cities matching `FRT`, All types, All priorities, All agencies, All zones

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ACCT

CCU POOLED GENERAL CHECKING

Dated From:

From Account:

Thru:

Thru Account:

Voucher Nbr	Check Date	Payee	Amount
6/25/2025 ABSOLUTE ASPHALT			
100-00-55200-242-000	PARKS	HISTORICAL SOC MAINT 7144	475.32
Total			475.32
6/25/2025 ACCU CLEAN			
APRIL			
100-00-51600-240-000	TOWN HALL BLDG MAINT	14324	128.75
APRIL			
100-00-52200-240-000	FIRE DEPARTMENT	BLDG MAINTEN 14324	128.75
100-00-55200-241-000	PARKS	VFW MAINTENANCE 14324	128.75
100-00-55200-242-000	PARKS	HISTORICAL SOC MAINT 14324	128.75
Total			515.00
6/25/2025 AGAS MFG INC			
100-00-51600-371-000	TOWN HALL FLAGS	IN254011724	74.00
Total			74.00
6/18/2025 ASSOCIATED TRUST COMPANY			
100-00-51520-316-000	TREASURER BANK SERVICE CHGS	26898	475.00
Total			475.00
6/12/2025 AT&T			
			Manual Check Nbr: AT&T
100-00-55200-220-000	PARKS	UTILITIES MAY	139.10
Total			139.10
6/25/2025 BUREAU OF CORRECTIONAL ENTERPRISES			
100-00-52200-350-000	FIRE SIGNS/ADDRESSES	924-003613	216.55

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ALL Checks by Payee

ACCT

CCU POOLED GENERAL CHECKING

Dated From:

From Account:

Thru:

Thru Account:

Voucher Nbr	Check Date	Payee	Amount
6/25/2025 D&D SOLUTIONS LLC			
100-00-55200-212-000	PARKS	CONTRACTED SERVICE DD78	1,800.00
Total			1,800.00
6/01/2025 DELTA DENTAL OF WISCONSIN			
100-00-21590-000-000	VISION PAYABLE	Manual Check Nbr: 930095	DELTA 85.40
100-00-21540-000-000	DENTAL PAYABLE	930095	639.68
Total			725.08
6/25/2025 DIGGERS HOTLINE			
100-00-53300-235-000	STREETS & HWY OTHER MAINT/DITC	250555851	205.20
Total			205.20
6/25/2025 EDER FLAG MANUFACTURING CO INC			
100-00-53300-371-000	STREETS & HWY FLAGS	IN0244730	731.18
Total			731.18
6/25/2025 EMPLOYEE RESOURCE CENTER, INC (ERC)			
100-00-51410-134-000	ADMIN OFFICE EAP BENEFITS	ERC-0625-1253	215.00
Total			215.00
6/25/2025 FABICK CAT TRACTOR COMPANY			
100-00-53300-354-000	STREETS & HWY VEHICLE EXP	MIGB00004216	305.00
Total			305.00
6/25/2025 FREEDOM MINI MART			
100-00-53300-355-000	STREETS & HWY FUEL	MAY	176.85

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ALL Checks by Payee

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CCU POOLED GENERAL CHECKING

Dated From:

From Account:

Thru:

Thru Account:

Voucher Nbr	Check Date	Payee	Amount
100-00-53300-355-000		STREETS & HWY FUEL	326.59
		439030	
100-00-53300-355-000		STREETS & HWY FUEL	566.64
		436728	
		Total	1,557.71

6/25/2025 GFC LEASING

Manual Check Nbr:

GFC LEAS

100-00-51410-311-000	ADMIN OFFICE TECH & COMP		176.30
		I01024048	
100-00-51410-311-000	ADMIN OFFICE TECH & COMP		80.41
		IN15200875	
		Total	256.71

6/25/2025 HARTERS FOX VALLEY DISPOSAL

100-00-55200-212-000	PARKS CONTRACTED SERVICE		219.00
		1278770	
100-00-53635-000-000	RECYCLING		9,033.48
		1278770	
100-00-53620-380-000	REFUSE SERVICE GARBAGE DISPOSAL		24,230.70
		1278770	
100-00-55200-383-000	PARKS TRASH/RECYCLING		64.00
		1278770	
		Total	33,547.18

6/25/2025 HINTZ TRUCKING

100-00-55200-390-000	PARKS MISC EXP		1,440.00
		1143	
		Total	1,440.00

6/25/2025 KLINK HYDRAULICS

100-00-53300-354-000	STREETS & HWY VEHICLE EXP		34.38
		46313	
		Total	34.38

6/25/2025 LANDSCAPE CONSTRUCTION SYSTEMS, LLC

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CCU POOLED GENERAL CHECKING

Dated From:

From Account:

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Thru Account:

Voucher Nbr	Check Date	Payee	Amount
100-00-21530-000-000		HEALTH INSURANCE PAYABLE	14,954.03
JUNE		10926626	
		Total	14,954.03
6/25/2025 OUTAGAMIE COUNTY HIGHWAY DEPARTMENT			
100-00-53400-000-000		STREETS & HWY SNOW REMOVAL	8,013.17
		1021788	
		Total	8,013.17
6/25/2025 PETERS CONCRETE COMPANY			
400-00-57620-000-000		PARK OUTLAY CAPITAL FUND	236,106.01
		MAY	
		Total	236,106.01
6/25/2025 RANDERCOM, LLC			
400-00-57140-000-000		TOWN HALL OUTLAY	757.84
		918750	
400-00-57140-000-000		TOWN HALL OUTLAY	24,968.59
		918759	
		Total	25,726.43
6/25/2025 REED SIMONS			
SAFETY SHOE REIMBURSEMENT REED			
100-00-53300-390-000		STREETS & HWY MISC/ENGINEERING	100.00
		SAFETY SHOE REIMBURSEMENT REED SAFETY SHOE	
		Total	100.00
6/25/2025 REINDERS INC			
100-00-55200-340-000		PARKS OPERATING SUPPLIES	65.00
		2734309-00	
		Total	65.00
6/25/2025 RIESTERER & SCHNELL INC			
100-00-53230-240-000		HWY GARAGE BLDG MAINTENANCE	29.50
		9103057	
		Total	29.50



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Dated From:

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Thru Account:

Voucher Nbr	Check Date	Payee	Amount
<hr/>			
	6/25/2025	SPEEDY CLEAN DRAIN & SEWER	
100-00-55200-241-000	PARKS	VFW MAINTENANCE	337.50
		87063	
		Total	337.50
<hr/>			
	6/25/2025	ST. NICHOLAS PARISH	
100-00-52300-000-000	FIRST RESPONDERS		70.00
		COUNTRY FEST	
		Total	70.00
<hr/>			
	6/25/2025	SUMMIT FIRE PROTECTION	
100-00-52200-240-000	FIRE DEPARTMENT	BLDG MAINTEN	2,330.00
		3327717	
		Total	2,330.00
<hr/>			
	6/25/2025	SWINKLES TRUCKING & EXCAVATING CORP.	
100-00-53300-235-000	STREETS & HWY OTHER MAINT/DITC		275.00
		0065392-IN	
100-00-55200-390-000	PARKS	MISC EXP	96.25
		0065361-IN	
		Total	371.25
<hr/>			
	6/25/2025	TERMINIX- WIL-KIL	
100-00-55200-241-000	PARKS	VFW MAINTENANCE	118.42
		77474269	
		Total	118.42
<hr/>			
	6/25/2025	TLC SIGN	
100-00-52300-000-000	FIRST RESPONDERS		97.85
		36659	
		Total	97.85
<hr/>			
	6/25/2025	UNIFIRST CORPORATION	
100-00-51600-240-000	TOWN HALL BLDG MAINT		74.41
		1481039766	

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CCU POOLED GENERAL CHECKING

Dated From:

From Account:

Thru:

Thru Account:

Voucher Nbr	Check Date	Payee	Amount
100-00-55200-241-000	PARKS	VFW MAINTENANCE	508.09
		JUNE	
100-00-55200-220-000	PARKS	UTILITIES	221.27
		JUNE	
100-00-55200-241-000	PARKS	VFW MAINTENANCE	142.62
		JUNE	
100-00-52200-240-000	FIRE DEPARTMENT	BLDG MAINTEN	16.47
		JUNE	
100-00-53420-000-000	STREET LIGHTING		533.83
		JUNE	
100-00-55200-220-000	PARKS	UTILITIES	55.88
		JUNE	
100-00-55200-241-000	PARKS	VFW MAINTENANCE	34.43
		JUNE	
100-00-52200-240-000	FIRE DEPARTMENT	BLDG MAINTEN	34.43
		JUNE	
		Total	6,741.26

6/05/2025 WEX BANK- WRIGHT EXPRESS

Manual Check Nbr:

WRIGHT

100-00-52200-355-000	FIRE DEPARTMENT	FUEL	210.69
		MAY	
		Total	210.69

6/25/2025 WISCONSIN TOWNS ASSOCIATION

DANA MCHUGH &amp; RACHEL KOLOCHESKI

100-00-51100-330-000	TOWN BOARD TRAINING/TRAVEL/TUI		1,198.00
	DANA MCHUGH & RACHEL KOLOCHESKI	CLERK COLLEGE	
		Total	1,198.00

6/25/2025 WOLF RIVER LAWYERS

100-00-51300-210-000	MUNICIPAL ATTORNEY LEGAL		1,406.00
		2742	
		Total	1,406.00

Grand Total 382,625.69

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Check Posting Control Report  
ALL Checks  
Posting Date: 6/25/2025

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CCU POOLED GENERAL CHECKING

Dated From:  
Thru:

Account Number	Account Code Description	Debit	Credit
100-00-11101-000-000	CCU -POOLED GENERAL CKING		104,656.71
	Total Expenditure - Fund # 100	104,656.71	
400-00-11101-000-000	CCU -POOLED GENERAL CKING		277,968.98
	Total Expenditure - Fund # 400	277,968.98	
	Total	382,625.69	382,625.69

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## CCU POOLED GENERAL CHECKING

## Accounting Checks

Posted From: 5/29/2025 From Account:  
Thru: 6/25/2025 Thru Account:

Check Nbr	Check Date	Payee	Amount
CAT	6/15/2025	CAT FINANCIAL	2,128.89
	Manual Check		
VOX	6/01/2025	VOXTELESYS	102.65
	Manual Check		
AT&T	6/12/2025	AT&T	139.10
	Manual Check		
40469	6/25/2025	ABSOLUTE ASPHALT	475.32
40470	6/25/2025	ACCU CLEAN	515.00
		APRIL	
40471	6/25/2025	AGAS MFG INC	74.00
40472	6/25/2025	ASSOCIATED TRUST COMPANY	475.00
40473	6/25/2025	BUREAU OF CORRECTIONAL ENTERPRISES	216.55
40474	6/25/2025	CAREW CONCRETE & SUPPLY CO	129.48
40475	6/25/2025	CARSTENS	103.42
40476	6/25/2025	COMMUNITY PLANNING & CONSULTING	1,927.00
40477	6/25/2025	COMPLETE OFFICE OF WISCONSIN	132.16
40478	6/25/2025	D&D SOLUTIONS LLC	1,800.00
40479	6/25/2025	DIGGERS HOTLINE	205.20
40480	6/25/2025	EDER FLAG MANUFACTURING CO INC	731.18
40481	6/25/2025	EMPLOYEE RESOURCE CENTER, INC (ERC)	215.00
40482	6/25/2025	FABICK CAT TRACTOR COMPANY	305.00
40483	6/25/2025	FREEDOM MINI MART	176.85
40484	6/25/2025	FREEDOM SANITARY DISTRICT #1	3,500.21
		MAY	
40485	6/25/2025	FREEDOM SCHOOL DISTRICT	736.92
40486	6/25/2025	GANNETT WISCONSIN LOCALIQ	408.58

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## CCU POOLED GENERAL CHECKING

## Accounting Checks

Posted From: 5/29/2025 From Account:  
Thru: 6/25/2025 Thru Account:

Check Nbr	Check Date	Payee	Amount
40487	6/25/2025	GARROW PROPANE CORPORATION	1,557.71
40488	6/25/2025	HARTERS FOX VALLEY DISPOSAL	33,547.18
40489	6/25/2025	HINTZ TRUCKING	1,440.00
40490	6/25/2025	KLINK HYDRAULICS	34.38
40491	6/25/2025	LANDSCAPE CONSTRUCTION SYSTEMS, LLC	725.00
40492	6/25/2025	MCC INC	185.18
40493	6/25/2025	MENARDS - DEPERE	569.15
40494	6/25/2025	MGD INDUSTRIAL INV 238324	4.38
40495	6/25/2025	MSA PROFESSIONAL SERVICES INC	26,066.04
40496	6/25/2025	OUTAGAMIE COUNTY HIGHWAY DEPARTMENT	8,013.17
40497	6/25/2025	PETERS CONCRETE COMPANY	236,106.01
40498	6/25/2025	RANDERCOM, LLC	25,726.43
40499	6/25/2025	REED SIMONS SAFETY SHOE REIMBURSEMENT REED	100.00
40500	6/25/2025	REINDERS INC	65.00
40501	6/25/2025	RIESTERER & SCHNELL INC	29.50
40502	6/25/2025	SERVICE MOTOR CO INC	258.48
40503	6/25/2025	SEYMOUR LUMBER	1,105.46
40504	6/25/2025	SHERWIN WILLIAMS	87.46
40505	6/25/2025	SOCIETY INSURANCE	1,837.75
40506	6/25/2025	SPEEDY CLEAN DRAIN & SEWER	337.50
40507	6/25/2025	ST. NICHOLAS PARISH	70.00

## CCU POOLED GENERAL CHECKING

## Accounting Checks

Posted From: 5/29/2025 From Account:  
Thru: 6/25/2025 Thru Account:

Check Nbr	Check Date	Payee	Amount
40508	6/25/2025	SUMMIT FIRE PROTECTION	2,330.00
40509	6/25/2025	SWINKLES TRUCKING & EXCAVATING CORP.	371.25
40510	6/25/2025	TERMINIX- WIL-KIL	118.42
40511	6/25/2025	TLC SIGN	97.85
40512	6/25/2025	UNIFIRST CORPORATION	213.14
40513	6/25/2025	VAN HANDEL AUTO BODY	413.01
40514	6/25/2025	WISCONSIN TOWNS ASSOCIATION DANA MCHUGH & RACHEL KOLOCHESKI	1,198.00
40515	6/25/2025	WOLF RIVER LAWYERS	1,406.00
DELTA	6/01/2025	DELTA DENTAL OF WISCONSIN	725.08
	Manual Check		
WE EN	6/18/2025	WE ENERGIES	6,741.26
	Manual Check		
WRS 4	5/30/2025	WISCONSIN RETIREMENT SYSTEM APRIL PAYROLL	5,489.76
	Manual Check		
RETIRE	5/30/2025	WISCONSIN RETIREMENT SYSTEM MAY 2025	5,330.43
	Manual Check		
WRIGHT	6/05/2025	WEX BANK- WRIGHT EXPRESS	210.69
	Manual Check		
CELLCOM	6/04/2025	CELLCOM	428.84
	Manual Check		
NETWORK	6/01/2025	NETWORK HEALTH JUNE	14,954.03
	Manual Check		
GFC LEAS	6/25/2025	GFC LEASING	256.71
	Manual Check		
SPECTRUM	6/01/2025	SPECTRUM-FIRE STATION	448.14
	Manual Check		
SPECTRUM	6/01/2025	SPECTRUM-TOWN	349.98
	Manual Check		
VOL FIRE	5/29/2025	FREEDOM VOLUNTEER FIRE COMPANY, INC MAY 2025 PAYMENT	11,583.33
	Manual Check		
EFTF 6 20	6/20/2025	EFTPS JUNE 20, 2025 PAYROLL	4,327.34
	Manual Check		
457b 06 06	6/06/2025	EMPOWER 457B - WDC JUNE 6, 2025 PAYROLL	175.00
	Manual Check		

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## CCU POOLED GENERAL CHECKING

## Accounting Checks

Posted From: 5/29/2025 From Account:  
Thru: 6/25/2025 Thru Account:

Check Nbr	Check Date	Payee	Amount
457B 06 20	6/20/2025	EMPOWER 457B - WDC	175.00
	Manual Check	JUNE 20, 2025 PAYROLL	
EFTPS06 06	6/06/2025	EFTPS	4,914.71
	Manual Check	JUNE 6, 2025 PAYROLL	
WI DEP REV	6/20/2025	WISCONSIN DEPARTMENT OF REVENUE	1,647.35
	Manual Check	JUNE PAYROLL	
BNK SVC CHG	5/31/2025	CAPITAL CREDIT UNION	70.00
	Manual Check	BANK SERVICE CHARGE MAY 2025	
		Grand Total	416,338.61

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CCU POOLED GENERAL CHECKING

Accounting Checks

Posted From: 5/29/2025 From Account:  
Thru: 6/25/2025 Thru Account:

	Amount
Total Expenditure from Fund # 100 - GENERAL FUND	138,369.63
Total Expenditure from Fund # 400 - CAPITAL PROJECTS	277,968.98
Total Expenditure from all Funds	416,338.61



## Unposted Included

Fund: All Funds

Account Number		2025 June	2025 Actual 06/20/2025	2025 Budget	Budget Status	% of Budget
100-00-41110-000-000	GENERAL PROPERTY TAXES	0.00	43,609.71	1,331,111.72	-1,287,502.01	3.28
300-00-41110-000-000	GENERAL PROPERTY TAXES	0.00	0.00	1,220,935.00	-1,220,935.00	0.00
400-00-41110-000-000	GENERAL PROPERTY TAXES	0.00	0.00	100,000.00	-100,000.00	0.00
100-00-41140-000-000	MOBILE HOME FEES	2,244.88	16,173.81	16,000.00	173.81	101.09
100-00-41150-000-000	FOREST CROPLAND/MFL	2.00	2.00	0.00	2.00	0.00
100-00-41811-000-000	USE VALUE PENALTY	0.00	0.00	1,500.00	-1,500.00	0.00
100-00-41910-000-000	COUNTY SALES TAX SHARE	0.00	90,898.50	129,951.19	-39,052.69	69.95
<b>TAXES</b>		<b>2,246.88</b>	<b>150,684.02</b>	<b>2,799,497.91</b>	<b>-2,648,813.89</b>	<b>5.38</b>
100-00-42300-000-000	SPECIAL ASSESSMENTS	0.00	350.00	0.00	350.00	0.00
<b>SPECIAL ASSESSMENTS</b>		<b>0.00</b>	<b>350.00</b>	<b>0.00</b>	<b>350.00</b>	<b>0.00</b>
100-00-43410-000-000	STATE SHARED REVENUES	0.00	376,627.20	323,507.37	53,119.83	116.42
100-00-43420-000-000	FIRE INSURANCE AID	0.00	0.00	30,000.00	-30,000.00	0.00
100-00-43430-000-000	EXEMPT COMPUTER	0.00	0.00	761.78	-761.78	0.00
100-00-43440-000-000	PERSONAL PROPERTY AID	0.00	45,185.81	46,078.50	-892.69	98.06
100-00-43530-000-000	STATE HWY AID	0.00	106,519.54	213,215.44	-106,695.90	49.96
100-00-43651-000-000	DNR URBAN FORESTRY GRANT	0.00	5,000.00	5,000.00	0.00	100.00
100-00-43691-000-000	ATC FUNDS	0.00	36,956.00	36,956.00	0.00	100.00
100-00-43790-000-000	COUNTY RECYCLING AID	8,785.40	50,242.40	96,000.00	-45,757.60	52.34
100-00-43792-000-000	INTERGOVERNMENTAL CONTRACTS	0.00	519.88	0.00	519.88	0.00
<b>INTERGOVERNMENTAL REVENUES</b>		<b>8,785.40</b>	<b>621,050.83</b>	<b>751,519.09</b>	<b>-130,468.26</b>	<b>82.64</b>
100-00-44102-000-000	DOG LICENSES	50.00	1,795.00	2,500.00	-705.00	71.80
100-00-44110-000-000	LIQUOR & MALT BEVERAGE LICENSE	1,665.00	4,580.00	10,000.00	-5,420.00	45.80
100-00-44113-000-000	CABLE FRANCHISE FEE	8,990.88	20,111.87	49,500.00	-29,388.13	40.63
100-00-44300-000-000	BUILDING PERMITS	6,290.00	47,387.50	100,000.00	-52,612.50	47.39
100-00-44400-000-000	PLANNING CHARGES	0.00	5,720.00	1,000.00	4,720.00	572.00
100-00-44900-000-000	OTHER PERMITS & FEES	0.00	0.00	2,000.00	-2,000.00	0.00
<b>LICENSES AND PERMITS</b>		<b>16,995.88</b>	<b>79,594.37</b>	<b>165,000.00</b>	<b>-85,405.63</b>	<b>48.24</b>
100-00-45100-000-000	LAW & ORDINANCE VIOLATIONS	207.95	943.92	2,000.00	-1,056.08	47.20
100-00-45200-000-000	ADDRESSES REVENUE	100.00	830.00	3,000.00	-2,170.00	27.67
<b>FINES, FORFEITS AND PENALTIES</b>		<b>307.95</b>	<b>1,773.92</b>	<b>5,000.00</b>	<b>-3,226.08</b>	<b>35.48</b>
100-00-46420-000-000	REFUSE & GARBAGE COLLECTION	0.00	0.00	318,400.00	-318,400.00	0.00
100-00-46725-000-000	PARK IMPACT FEES	300.00	3,300.00	6,000.00	-2,700.00	55.00
<b>PUBLIC CHARGES FOR SERVICES</b>		<b>300.00</b>	<b>3,300.00</b>	<b>324,400.00</b>	<b>-321,100.00</b>	<b>1.02</b>
100-00-47390-000-000	FREEDOM SCHOOL PARK REIMB	0.00	0.00	8,000.00	-8,000.00	0.00
<b>INTERGOV'T. CHARGES FOR SERV.</b>		<b>0.00</b>	<b>0.00</b>	<b>8,000.00</b>	<b>-8,000.00</b>	<b>0.00</b>
100-00-48100-000-000	INTEREST REVENUE	0.00	62,962.72	25,000.00	37,962.72	251.85
410-00-48100-000-000	INTEREST REVENUE	0.00	45.38	0.00	45.38	0.00
420-00-48100-000-000	INTEREST REVENUE	0.00	2,500.22	0.00	2,500.22	0.00
100-00-48200-000-000	RENT REVENUE	0.00	125.00	12,000.00	-11,875.00	1.04
100-00-48900-000-000	MISC REVENUES	4,082.40	12,177.30	0.00	12,177.30	0.00
410-00-48900-000-000	MISC REVENUES	0.00	15,756.66	1,714.37	14,042.29	919.09
420-00-48900-000-000	MISC REVENUES	0.00	30,321.84	43,471.44	-13,149.60	69.75

Unposted Included

Fund: All Funds

		2025	2025	2025	
		Actual	Budget	Budget	% of
Account Number		June	06/20/2025	Status	Budget
MISCELLANEOUS REVENUES		4,082.40	123,889.12	82,185.81	41,703.31
					150.74
400-00-49101-000-000	STATE TRUST FUND LOAN	0.00	1,532,675.00	0.00	1,532,675.00
400-00-49102-000-000	BOND PROCEEDS	0.00	0.00	1,532,672.00	-1,532,672.00
					0.00
OTHER FINANCING SOURCES		0.00	1,532,675.00	1,532,672.00	3.00
					100.00
Total Revenues		32,718.51	2,513,317.26	5,668,274.81	-3,154,957.55
					44.34

## Unposted Included

Fund: All Funds

Account Number		2025 June	2025 Actual 06/20/2025	2025 Budget	Budget Status	% of Budget
100-00-51100-110-000	TOWN BOARD WAGES OR SALARIES	2,083.33	11,374.98	25,000.00	13,625.02	45.50
100-00-51100-130-000	TOWN BOARD SOCIAL SEC/MEDICARE	159.39	870.28	1,912.50	1,042.22	45.50
100-00-51100-320-000	TOWN BOARD DUES & PUBLICATIONS	0.00	2,335.00	2,000.00	-335.00	116.75
100-00-51100-330-000	TOWN BOARD TRAINING/TRAVEL/TUI	0.00	2,021.30	4,000.00	1,978.70	50.53
100-00-51300-210-000	MUNICIPAL ATTORNEY LEGAL	0.00	5,244.64	30,000.00	24,755.36	17.48
100-00-51410-110-000	ADMIN OFFICE WAGES OR SALARIES	17,612.26	107,437.77	206,440.00	99,002.23	52.04
100-00-51410-130-000	ADMIN OFFICE SOCIAL SEC/MEDICA	1,248.53	7,585.91	15,792.66	8,206.75	48.03
100-00-51410-131-000	ADMIN OFFICE WRS	1,224.04	7,466.89	14,357.48	6,890.59	52.01
100-00-51410-132-000	ADMIN OFFICE EMPLOYEE BENEFITS	7,047.82	38,626.14	63,827.04	25,200.90	60.52
100-00-51410-134-000	ADMIN OFFICE EAP BENEFITS	0.00	1,075.00	5,000.00	3,925.00	21.50
100-00-51410-135-000	ADMIN OFFICE LIFE/AD/STD/LTD	0.00	0.00	2,724.36	2,724.36	0.00
100-00-51410-223-000	ADMIN OFFICE PHONE	0.00	2,467.33	8,000.00	5,532.67	30.84
100-00-51410-310-000	ADMIN OFFICE OFFICE SUPPLIES &	0.00	713.04	4,200.00	3,486.96	16.98
100-00-51410-311-000	ADMIN OFFICE TECH & COMP	0.00	12,253.61	31,495.23	19,241.62	38.91
100-00-51410-312-000	WORKHORSE SUPPORT FEES	0.00	0.00	3,250.00	3,250.00	0.00
100-00-51410-315-000	ADMIN OFFICE PRINT /ADV	0.00	0.00	2,500.00	2,500.00	0.00
100-00-51410-330-000	ADMIN - TRAIN/TRAVEL/TUITION	86.80	563.80	3,000.00	2,436.20	18.79
100-00-51440-110-000	ELECTIONS	0.00	10,632.93	30,000.00	19,367.07	35.44
100-00-51510-000-000	AUDIT & ACCOUNTING	0.00	10,100.00	13,700.00	3,600.00	73.72
410-00-51510-000-000	AUDIT & ACCOUNTING	0.00	0.00	3,400.00	3,400.00	0.00
420-00-51510-000-000	AUDIT & ACCOUNTING	0.00	0.00	3,400.00	3,400.00	0.00
430-00-51510-000-000	AUDIT & ACCOUNTING	0.00	0.00	3,400.00	3,400.00	0.00
100-00-51520-316-000	TREASURER BANK SERVICE CHGS	0.00	385.00	3,000.00	2,615.00	12.83
100-00-51530-110-000	ASSESSMENT OF PROPERTY WAGES O	0.00	27,600.00	55,000.00	27,400.00	50.18
100-00-51600-110-000	TOWN HALL WAGES	0.00	3,912.53	700.00	-3,212.53	558.93
100-00-51600-130-000	TOWN HALL SS/MEDICARE	0.00	279.06	50.00	-229.06	558.12
100-00-51600-131-000	TOWN HALL WRS	0.00	271.92	40.00	-231.92	679.80
100-00-51600-132-000	TOWN HALL EMP BENEFITS	0.00	1,823.98	250.00	-1,573.98	729.59
100-00-51600-240-000	TOWN HALL BLDG MAINT	0.00	11,647.05	15,000.00	3,352.95	77.65
100-00-51600-350-000	TOWN HALL	0.00	2,220.77	5,000.00	2,779.23	44.42
100-00-51600-371-000	TOWN HALL FLAGS	-60.00	422.70	600.00	177.30	70.45
100-00-51600-390-000	TOWN HALL MISC EXP	0.00	1,326.86	5,000.00	3,673.14	26.54
100-00-51600-510-000	TOWN HALL PROPERTY/LIABIITY IN	0.00	35,296.50	45,000.00	9,703.50	78.44
100-00-51981-000-000	INSURANCE RECOVERIES	0.00	168,958.01	0.00	-168,958.01	0.00
<b>GENERAL GOVERNMENT</b>		<b>29,402.17</b>	<b>474,913.00</b>	<b>607,039.27</b>	<b>132,126.27</b>	<b>78.23</b>
100-00-52100-000-000	POLICE DEPARTMENT	0.00	0.00	207,395.00	207,395.00	0.00
100-00-52200-110-000	FIRE DEPARTMENT WAGES	134.56	179.86	1,500.00	1,320.14	11.99
100-00-52200-130-000	FIRE DEPARTMENT SS/MED	9.35	12.61	110.00	97.39	11.46
100-00-52200-131-000	FIRE DEPARTMENT WRS	9.35	12.50	45.00	32.50	27.78
100-00-52200-132-000	FIRE DEPT EMP BENEFITS	49.95	73.68	210.00	136.32	35.09
100-00-52200-212-000	FIRE DEPARTMENT CONTRACTED S	0.00	57,916.65	139,000.00	81,083.35	41.67
100-00-52200-240-000	FIRE DEPARTMENT BLDG MAINTEN	0.00	24,575.02	45,500.00	20,924.98	54.01
100-00-52200-350-000	FIRE SIGNS/ADDRESSES	0.00	443.48	3,000.00	2,556.52	14.78
100-00-52200-355-000	FIRE DEPARTMENT FUEL	0.00	1,440.97	4,000.00	2,559.03	36.02
100-00-52220-000-000	PUBLIC FIRE PROT WATER BILL	0.00	52,652.50	113,000.00	60,347.50	46.60
100-00-52300-000-000	FIRST RESPONDERS	3,180.00	5,509.57	25,000.00	19,490.43	22.04
100-00-52300-110-000	FIRST RESP DIRECTOR WAGES	0.00	0.00	5,000.00	5,000.00	0.00
100-00-52300-130-000	FIRST RESPOND DIRECTOR SS/MED	69.84	69.84	382.50	312.66	18.26
100-00-52300-213-000	FIRST RESPONDER FLEX GRANT	173.44	173.44	0.00	-173.44	0.00
100-00-52301-110-000	FIRST RESPOND ASST DIR WAGES	0.00	0.00	2,500.00	2,500.00	0.00
100-00-52301-130-000	FIRST RESPOND ASST SS/MED	0.00	0.00	191.25	191.25	0.00

## Unposted Included

Fund: All Funds

Account Number		2025 June	2025 Actual 06/20/2025	2025 Budget	Budget Status	% of Budget
100-00-52400-000-000	BUILDING INSPECTOR	0.00	32,277.28	48,000.00	15,722.72	67.24
100-00-52600-000-000	EMERGENCY GOV'T	0.00	0.00	3,500.00	3,500.00	0.00
100-00-52600-110-000	EMERGENCY DIRECTOR WAGES	0.00	0.00	1,000.00	1,000.00	0.00
100-00-52600-130-000	EMERGENCY DIR SS/MED	0.00	0.00	76.50	76.50	0.00
<b>PUBLIC SAFETY</b>		<b>3,626.49</b>	<b>175,337.40</b>	<b>599,410.25</b>	<b>424,072.85</b>	<b>29.25</b>
100-00-53230-240-000	HWY GARAGE BLDG MAINTENANCE	0.00	7,135.20	35,000.00	27,864.80	20.39
100-00-53300-110-000	STREETS & HWY WAGES OR SALARIE	12,474.50	85,006.91	124,411.08	39,404.17	68.33
100-00-53300-130-000	STREETS & HWY SOCIAL SEC/MEDIC	889.43	6,034.72	9,517.45	3,482.73	63.41
100-00-53300-131-000	STREETS & HWY WRS	726.57	4,183.68	8,646.57	4,462.89	48.39
100-00-53300-132-000	STREETS & HWY EMPLOYEE BENEFIT	2,932.86	12,549.55	74,823.36	62,273.81	16.77
100-00-53300-230-000	STREETS & HWY OUTAGAMIE CTY RD	0.00	0.00	44,695.00	44,695.00	0.00
100-00-53300-231-000	STREETS & HWY ROAD SWEEPING	0.00	0.00	10,000.00	10,000.00	0.00
100-00-53300-232-000	STREETS & HWY SEALCOAT/CRACK F	0.00	40,503.68	100,000.00	59,496.32	40.50
100-00-53300-235-000	STREETS & HWY OTHER MAINT/DITC	0.00	9,987.44	100,000.00	90,012.56	9.99
100-00-53300-354-000	STREETS & HWY VEHICLE EXP	0.00	17,541.52	20,000.00	2,458.48	87.71
100-00-53300-355-000	STREETS & HWY FUEL	0.00	4,435.67	20,000.00	15,564.33	22.18
100-00-53300-370-000	STREETS & HWY RDWAY SUPPLIES	0.00	6,516.94	10,000.00	3,483.06	65.17
100-00-53300-371-000	STREETS & HWY FLAGS	0.00	420.00	1,500.00	1,080.00	28.00
100-00-53300-390-000	STREETS & HWY MISC/ENGINEERING	0.00	320.34	30,000.00	29,679.66	1.07
100-00-53400-000-000	STREETS & HWY SNOW REMOVAL	0.00	107,226.72	60,000.00	-47,226.72	178.71
100-00-53420-000-000	STREET LIGHTING	0.00	18,512.53	50,000.00	31,487.47	37.03
100-00-53510-110-000	SNOW REMOVAL WAGES	0.00	7,494.49	17,268.98	9,774.49	43.40
100-00-53510-130-000	SNOW REMOVAL SS/MED	0.00	545.68	1,321.08	775.40	41.31
100-00-53510-131-000	SNOW REMOVAL WRS	0.00	520.88	1,200.19	679.31	43.40
100-00-53510-132-000	SNOW REMOVAL EMP BENEFITS	0.00	1,595.54	10,385.91	8,790.37	15.36
100-00-53620-000-000	REFUSE SERVICE	0.00	0.00	318,400.00	318,400.00	0.00
100-00-53620-380-000	REFUSE SERVICE GARBAGE DISPOSAL	0.00	119,940.00	0.00	-119,940.00	0.00
100-00-53620-382-000	REFUSE SERVICE YARD WASTE	0.00	0.00	12,000.00	12,000.00	0.00
100-00-53635-000-000	RECYCLING	0.00	46,339.98	110,000.00	63,660.02	42.13
100-00-53635-110-000	RECYCLING WAGES/SAL	1,468.41	3,226.69	71,705.18	68,478.49	4.50
100-00-53635-130-000	RECYCLING SS/MED	104.32	228.33	5,485.45	5,257.12	4.16
100-00-53635-131-000	RECYCLING WRS	102.06	224.26	4,983.51	4,759.25	4.50
100-00-53635-132-000	RECYCLING EMPL BEN	423.55	978.99	43,124.95	42,145.96	2.27
410-00-53901-000-000	TIF #1 EXPENDITURES	0.00	6,375.00	0.00	-6,375.00	0.00
<b>PUBLIC WORKS (OLD)</b>		<b>19,121.70</b>	<b>507,844.74</b>	<b>1,294,468.71</b>	<b>786,623.97</b>	<b>39.23</b>
100-00-54900-000-000	HUMANE SOCIETY EXP	0.00	160.00	1,500.00	1,340.00	10.67
100-00-54920-000-000	CIVIC PROGRAMS	0.00	0.00	1,000.00	1,000.00	0.00
<b>HEALTH AND HUMAN SERVICES</b>		<b>0.00</b>	<b>160.00</b>	<b>2,500.00</b>	<b>2,340.00</b>	<b>6.40</b>
100-00-55200-110-000	PARKS WAGES OR SALARIES	9,414.51	25,072.09	50,629.17	25,557.08	49.52
100-00-55200-130-000	PARKS SOCIAL SEC/MEDICARE	677.33	1,792.03	2,520.61	728.58	71.10
100-00-55200-131-000	PARKS WRS	503.08	1,591.27	2,289.97	698.70	69.49
100-00-55200-132-000	PARKS EMPLOYEE BENEFITS	3,116.88	8,432.13	19,816.30	11,384.17	42.55
100-00-55200-212-000	PARKS CONTRACTED SERVICE	0.00	16,054.03	10,000.00	-6,054.03	160.54
100-00-55200-220-000	PARKS UTILITIES	0.00	4,209.03	20,000.00	15,790.97	21.05
100-00-55200-221-000	PARKS VFW PK LIGHTING	0.00	0.00	8,000.00	8,000.00	0.00
100-00-55200-241-000	PARKS VFW MAINTENANCE	0.00	8,091.19	8,000.00	-91.19	101.14
100-00-55200-242-000	PARKS HISTORICAL SOC MAINT	0.00	2,803.32	5,000.00	2,196.68	56.07
100-00-55200-340-000	PARKS OPERATING SUPPLIES	0.00	2,337.37	7,000.00	4,662.63	33.39



## Unposted Included

Fund: All Funds

Account Number		2025 June	2025 Actual 06/20/2025	2025 Budget	Budget Status	% of Budget
100-00-55200-355-000	PARKS FUEL	0.00	0.00	10,000.00	10,000.00	0.00
100-00-55200-383-000	PARKS TRASH/RECYCLING	0.00	799.24	3,000.00	2,200.76	26.64
100-00-55200-390-000	PARKS MISC EXP	0.00	3,534.65	1,000.00	-2,534.65	353.47
100-00-55200-810-000	PARKS EQUIPMENT	0.00	1,764.96	10,000.00	8,235.04	17.65
<b>CULTURE, RECREATION AND EDU.</b>		<b>13,711.80</b>	<b>76,481.31</b>	<b>157,256.05</b>	<b>80,774.74</b>	<b>48.63</b>
100-00-56400-000-000	TOWN ENGINEER	0.00	3,626.96	25,000.00	21,373.04	14.51
100-00-56400-215-000	TOWN PLANNER	0.00	6,298.00	25,000.00	18,702.00	25.19
100-00-56401-110-000	PLANNING COMM WAGES OR SALARIE	0.00	1,125.00	5,000.00	3,875.00	22.50
100-00-56401-130-000	PLANNING COMM SOCIAL SEC/MEDIC	0.00	86.07	6.00	-80.07	1,434.50
<b>CONSERVATION AND DEVELOPMENT</b>		<b>0.00</b>	<b>11,136.03</b>	<b>55,006.00</b>	<b>43,869.97</b>	<b>20.25</b>
100-00-57100-000-000	CONTINGENCY FUND	0.00	0.00	64,001.72	64,001.72	0.00
400-00-57140-000-000	TOWN HALL OUTLAY	0.00	40,654.44	85,000.00	44,345.56	47.83
400-00-57324-000-000	HWY OUTLAY	0.00	47,543.98	85,000.00	37,456.02	55.93
400-00-57339-000-000	OTHER HIGHWAY ROAD PROJECTS	0.00	21,659.00	442,672.00	421,013.00	4.89
400-00-57620-000-000	PARK OUTLAY CAPITAL FUND	0.00	123,502.20	1,020,000.00	896,497.80	12.11
<b>CAPITAL OUTLAY</b>		<b>0.00</b>	<b>233,359.62</b>	<b>1,696,673.72</b>	<b>1,463,314.10</b>	<b>13.75</b>
410-00-58100-610-000	DEBT SERVICE PRINCIPAL	0.00	100,000.00	0.00	-100,000.00	0.00
410-00-58100-620-000	DEBT SERVICE INTEREST	0.00	14,138.75	0.00	-14,138.75	0.00
420-00-58100-620-000	DEBT SERVICE INTEREST	0.00	50,107.50	0.00	-50,107.50	0.00
300-00-58101-610-000	BOND #2 PRINCIPAL	0.00	170,000.00	505,000.00	335,000.00	33.66
300-00-58101-620-000	BOND #2 INTEREST	0.00	20,600.00	41,200.00	20,600.00	50.00
300-00-58109-610-000	STATE TRUST 02021106.01 PRINCI	0.00	66,538.05	66,538.00	-0.05	100.00
300-00-58109-620-000	STATE TRUST 02021106.01 INTERE	0.00	3,368.49	3,368.50	0.01	100.00
300-00-58110-610-000	FIRE EMS BOND #3 PRINCIPAL	0.00	0.00	170,000.00	170,000.00	0.00
300-00-58110-620-000	FIRE EMS BOND #3 INTEREST	0.00	37,771.88	72,144.00	34,372.12	52.36
300-00-58112-610-000	FIRE TRUCK ENGINE PRINCIPAL	0.00	80,000.00	80,000.00	0.00	100.00
300-00-58112-620-000	FIRE TRUCK ENGINE INTEREST	0.00	18,857.00	35,970.50	17,113.50	52.42
300-00-58113-610-000	STATE TRUST 02220518.01	0.00	94,000.00	94,000.00	0.00	100.00
300-00-58113-620-000	STATE TRUST 02220518.01 INT	0.00	12,091.05	22,814.00	10,722.95	53.00
300-00-58115-610-000	TOWN OF FREE (RES 2021-03) PRI	0.00	110,000.00	110,000.00	0.00	100.00
300-00-58115-620-000	TOWN OF FREE (RES 2021-03) INT	0.00	10,775.00	19,900.00	9,125.00	54.15
<b>DEBT SERVICE</b>		<b>0.00</b>	<b>788,247.72</b>	<b>1,220,935.00</b>	<b>432,687.28</b>	<b>64.56</b>
<b>Total Expenses</b>		<b>65,862.16</b>	<b>2,267,479.82</b>	<b>5,633,289.00</b>	<b>3,365,809.18</b>	<b>40.25</b>
<b>Net Totals</b>		<b>-33,143.65</b>	<b>245,837.44</b>	<b>34,985.81</b>	<b>-210,851.63</b>	<b>702.68</b>

General Obligation Promissory Note

April 2025

Category	Budgeted Amount	Spent	Remaining
Town Hall Outlay / Randercom	\$ 85,000.00	\$ 66,380.87	\$ 18,619.13
Hwy Outlay / Mower & RTV	\$ 85,000.00	\$ 47,543.98	\$ 37,456.02
Other Highway Road Projects / Vine Rd & Maloney Road	\$ 442,672.00	\$ 30,919.38	\$ 411,752.62
Diamond 1 Outlay	\$ 955,328.00	\$ 366,484.37	\$ 588,843.63
Total	\$ 1,568,000.00	\$ 511,328.60	\$ 1,056,671.40

This sheet auto calculates, do not update column C or D manually

General Obligation Promissory Note

April 2025

<u>Date</u>	<u>Check #</u>	<u>Payee</u>	<u>Amount</u>	<u>Category</u>
1/22/2025	40270	Randercom	\$39,697.44	Town Hall Outlay / Randercom
5/28/2025	40455	Randercom	\$957.00	Town Hall Outlay / Randercom
5/28/2025	40458	Service Motors	\$47,543.98	Hwy Outlay / Mower & RTV
3/26/2025	40350	MSA Professionals	\$4,916.80	Other Highway Road Projects / Vine Rd & Maloney Road
4/23/2025	40397	MSA Professionals	\$14,766.22	Other Highway Road Projects / Vine Rd & Maloney Road
5/28/2025	40449	MSA Professionals	\$1,975.98	Other Highway Road Projects / Vine Rd & Maloney Road
2/26/2025	40310	MSA Professionals	\$2,626.39	Diamond 1 Outlay
3/26/2025	40350	MSA Professionals	\$9,735.00	Diamond 1 Outlay
4/23/2025	40397	MSA Professionals	\$7,070.00	Diamond 1 Outlay
4/23/2025	40401	Peters Concrete	\$94,196.06	Diamond 1 Outlay
5/28/2025	40449	MSA Professionals	\$9,874.75	Diamond 1 Outlay
6/25/2025	40498	Randercom	\$757.84	Town Hall Outlay / Randercom
6/25/2025	40498	Randercom	\$24,968.59	Town Hall Outlay / Randercom
6/25/2025	40495	MSA Professionals	\$9,260.38	Other Highway Road Projects / Vine Rd & Maloney Road
6/25/2025	40495	MSA Professionals	\$6,876.16	Diamond 1 Outlay
6/25/2025	40497	MSA Professionals	\$236,106.01	Diamond 1 Outlay

6/20/2025

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## Transactions Detail Report - Full Description

Page: 1

Dated From: 1/01/2025

From Account: 400-00-57140-000-000

ACCT

Thru: 6/30/2025

Thru Account: 400-00-57140-000-000

Type of Account: Active

Fund # 400 - CAPITAL PROJECTS

Debit

Credit

400-00-57140-000-000

TOWN HALL OUTLAY

Posting Date	Type	Transaction Number	Date		
1/22/2025	DIS	40270	1/22/2025	RANDERCOM, LLC 918283	39,697.44
5/28/2025	DIS	40455	5/28/2025	RANDERCOM, LLC CORRECTION 918701	957.00
6/25/2025	DIS	40498	6/25/2025	RANDERCOM, LLC 918750	757.84
6/25/2025	DIS	40498	6/25/2025	RANDERCOM, LLC 918759	24,968.59
				Ending Balance:	66,380.87
				Fund Totals:	
				Beginning	0.00
					66,380.87
				Ending	66,380.87
					0.00



400-00-57324-000-000				HWY OUTLAY		
				HWY OUTLAY		
Posting	Transaction					
Date	Type	Number	Date			
5/28/2025	DIS	40458	5/28/2025	SERVICE MOTOR CO INC	24,814.31	
				UO2300		
5/28/2025	DIS	40458	5/28/2025	SERVICE MOTOR CO INC	18,143.72	
				UO2341		
5/28/2025	DIS	40458	5/28/2025	SERVICE MOTOR CO INC	264.34	
				P85288		
5/28/2025	DIS	40458	5/28/2025	SERVICE MOTOR CO INC	376.18	
				LATCH		
5/28/2025	DIS	40458	5/28/2025	SERVICE MOTOR CO INC	3,945.43	
				U02343		
				Ending Balance:	47,543.98	
Fund Totals:					Beginning	0.00
						0.00
					Ending	47,543.98
						0.00

6/20/2025

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## Transactions Detail Report - Full Description

Page: 1

Dated From: 1/01/2025

From Account: 400-00-57339-000-000

ACCT

Thru: 6/30/2025

Thru Account: 400-00-57339-000-000

Type of Account: Active

Fund # 400 - CAPITAL PROJECTS

Debit

Credit

400-00-57339-000-000

## OTHER HIGHWAY ROAD PROJECTS

Posting Date	Type	Transaction Number	Date		
3/26/2025	DIS	40350	3/26/2025	MSA PROFESSIONAL SERVICES INC 013716	4,916.80
4/23/2025	DIS	40397	4/23/2025	MSA PROFESSIONAL SERVICES INC 014846	14,766.22
5/28/2025	DIS	40449	5/28/2025	MSA PROFESSIONAL SERVICES INC 015839	1,975.98
6/25/2025	DIS	40495	6/25/2025	MSA PROFESSIONAL SERVICES INC 017379	9,260.38
				Ending Balance:	30,919.38

Fund Totals:

Beginning

0.00

0.00

30,919.38

0.00

Ending

30,919.38

0.00

400-00-57620-000-000				PARK OUTLAY CAPITAL FUND			
Posting	Transaction						
Date	Type	Number	Date				
2/26/2025	DIS	40310	2/26/2025	MSA PROFESSIONAL SERVICES INC		2,626.39	
				013154			
3/26/2025	DIS	40350	3/26/2025	MSA PROFESSIONAL SERVICES INC		9,735.00	
				013703			
4/23/2025	DIS	40397	4/23/2025	MSA PROFESSIONAL SERVICES INC		7,070.00	
				014847			
4/23/2025	DIS	40401	4/23/2025	PETERS CONCRETE COMPANY		94,196.06	
				APRIL			
5/28/2025	DIS	40449	5/28/2025	MSA PROFESSIONAL SERVICES INC		9,874.75	
				015872			
6/25/2025	DIS	40495	6/25/2025	MSA PROFESSIONAL SERVICES INC		6,876.16	
				017034			
6/25/2025	DIS	40497	6/25/2025	PETERS CONCRETE COMPANY		236,106.01	
				MAY			
				Ending Balance:		366,484.37	
Fund Totals:				Beginning	0.00	0.00	
					366,484.37	0.00	
				Ending	366,484.37	0.00	