

**CITY OF MONROE - GENERAL SERVICES COMMITTEE
CITY HALL CONFERENCE ROOM
300 W. CROWELL STREET, MONROE, NC 28112
Thursday, October 15, 2020 - 4:00 PM**

**AGENDA
www.monroenc.org**

1. General Services Committee Meeting Minutes from July 16, 2020
2. Demolition at 311 East Jefferson Street
3. Cityview Budget Amendment

Other Items



**CITY OF MONROE
GENERAL SERVICES COMMITTEE MEETING**

City Hall Conference Room
300 W. Crowell Street
Monroe, NC 28112
July 16, 2020 4:00 PM

MINUTES

Present: Committee Member Lynn Keziah (Chairman), Committee Member Mayor Pro Tem Marion Holloway, Committee Member Franco McGee, Committee Member Hayden Munn

Absent: Committee Member Gary Anderson

Staff: Larry Faison, City Manager (by conference call); Brian Borne, Assistant City Manager; Mujeeb Shah-Khan, City Attorney; Lisa Strickland, Finance Director; Angela Duncan, Budget Analyst; Pete Hovanec, Director of Communication & Tourism; Tonya Edwards, Director of Parks & Recreation; Ashley Britt, Assistant City Attorney (by conference call); Peter Cevallos, Airport Manager; David Morton, Police Captain, David Lucore, Director of Energy Services

Visitor(s): None

The General Services Committee met in the City Hall Conference Room at 4:00 p.m. on July 16, 2020. A quorum was present. Chairman Keziah presided.

Item 1. General Services Committee Meeting Minutes from February 27, 2020.

Mayor Pro Tem Holloway moved to approve the Minutes of the General Services Committee Meeting of February 27, 2020.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 2. Acceptance of FAA CARES Grant Award

Airport Manager, Peter Cevallos informed the Committee about that the City has been awarded a grant under the Federal Aviation Administration's CARES act. Staff is requesting acceptance of the grant.

The Coronavirus Aid, Relief, and Economic Security (CARES) Act (H.R. 748, Public Law 116- 136), signed into law by the President on March 27, 2020, includes \$10 billion in funds to be awarded as economic relief to eligible U.S. airports affected by the prevention of, preparation for, and response to the COVID-19 pandemic.

Under this grant fund program, General Aviation airports will receive funds based on their airport categories; our Airport is classified as a "RED" Airport having regional impact to the National Air Transportation System. The City of Monroe was awarded \$69,000, and is to be used for eligible expenditures which airport revenues may lawfully be used, pursuant to the FAA's Policy and Procedures Concerning the Use of Airport Revenue (Revenue-Use Policy). Such expenditures are defined as payroll, utility bills, operational expenses, or payment of debt service. The grant is a 100% federal grant with no local match required, and all grant acceptance documentation is handled at the State level as North Carolina is a block grant state (the FAA delegates grant administration authority and responsibility to our state). As this grant has already been accepted by the NC Division of Aviation, Department of Transportation, the funds the City is allocated are available. The only requirement is that the City submit receipts for reimbursement the Airport expenditures that are related to the COVID-19 pandemic.

This request was presented at the regularly scheduled meeting for June 2020 of the Monroe Airport Commission where it was unanimously voted to move forward to City Council for approval.

Mayor Pro Tem Holloway made a motion to recommend the acceptance of the FAA CARES Grant Award and forward to full Council.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 3. Implementation of Airport Access Control Policy.

Airport Manager, Peter Cevallos presented a policy drafted by Airport staff that addresses access control onto the Airport.

Airport staff has drafted a policy that addresses access control onto the Airport. This policy was drafted because there is no written guidance on how access onto the Charlotte-Monroe Executive Airport for based customers and/or visitors is administered and managed. The policy defines the system, the administration, the operation, and the available support system that control access to the Airport. The policy is designed to reduce vulnerabilities and adopt consistent and appropriate security measures as recommended by the Transportation Security Administration for general aviation airports, addressing provisions for the safety and security of persons and property at the Airport.

The policy was coordinated through the City Attorney and Police Department, and presented at the June 2020 Monroe Airport Commission meeting where recommended action was taken to implement this policy. The policy was referred for City Council approval, but staff believes this item to be a staff policy that can be approved by the City Manager. The policy is being submitted to Council for information purposes only.

City Attorney, Majeed Shah-Khan informed the Committee that City Manager, Larry Faison can sign the policy and a Committee vote was not necessary.

Item 4. Budget Amendment to Support Rate Increase for US Customs Service Agreement.

Airport Manager, Peter Cevallos presented information regarding the rate increase in the service agreement between the City and US Custom Border Protection Agency, for customs processing services at the Charlotte-Monroe Executive Airport. The budget amendment is necessary to keep the services active as to support the corporate aviation operators that utilize that service at the Airport.

To have Customs processing the Airport, the City participates in the US Custom and Border Protection Agency (CBP) the User Fee Facility (UFF) program. CBP created the UFF program in 1984 to expand customs services at locations where the volume or value of business is insufficient to justify the availability of full-time inspectional services on a non-reimbursable basis. The City of Monroe signed an agreement with CBP in 2011 to participate in this program, which the Airport is one of 60 small airports in the US that provide this service.

The current flat rate fee the City pays to be in this User Fee Facility (UFF) program is \$123,438 a year, divided into four quarterly payments. The City has received notification from the Customs Border Protection (CBP) of a pending rate increase for their services because the agency has seen significant changes to salary, cost of living, benefits, and pay level for CBP employees. CBP has assessed the need to transition the UFF program from its current flat rate to a full cost recovery

approach in order to remain compliant with current federal employment regulations. The new fee amount that CBP intends to collect will be based on the salary with benefits of the CBP Officers assigned to the UFF facility. An additional administrative charge for administrative overhead cost shall be collected to reimburse CBP for compensation and/or expenses of CBP Officers performing reimbursable services. The new rate CBP is requesting the City pay is calculated to be a maximum of \$171,764 a year, which is an increase of \$48,326 over the current budgeted amount of \$123,438.

CBP officials have requested the City provide a formal response by August 14 if it agrees to continue services at this new rate; currently customs processing services are paused at the Airport until the City provides a response.

The Airport Manager has confirmed with the largest operators at the Airport SPX Inc, and Charter Jet Transport that the availability of customs processing has a definitive impact to their aircraft operations, and any termination of this service would be seriously factored in their decision to be at the Airport. In addition, the Airport has grown in sufficient size and standing in the corporate aviation industry that eliminating customs processing would set back the growth the Airport has seen in recent years.

Airport Manager, Peter Cevallos stated that this is the first rate increase since the service agreement began. Mayor Pro Tem Holloway asked if future rate increases would be for cost of living or should the City be expecting additional hefty rate increases. Airport Manager, Peter Cevallos responded that no formal information has been provided as such, however it was his opinion that any future rate increases would be inflation based. He also agreed to ask the vendor.

Mayor Pro Tem Holloway made a motion to recommend approval of the budget amendment and forward to full Council.

Committee Member Munn seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 5. Amendment to School Resource Officers Agreement Between City of Monroe and Union County Board of Education.

Finance Director, Lisa Strickland presented a request to authorize the City Manager to amend the School Resource Officer Agreement with Union County Board of Education and consider a budget amendment to designate funding for two additional part time positions in the Police Department.

The City of Monroe and the Union County Board of Education entered into an agreement for a School Resource Officers on July 1, 2009. The School Board has requested that the City of Monroe provide two additional part time police officers for a total of four officers that would be assigned to Union County Public Schools. Per the contractual agreement, the School Board agrees to reimburse the City for 100% of the actual costs of the police officer including salary and benefits. Staff is requesting authorization for the City Manager to execute a new agreement for two additional officers with the Union County Board of Education.

Staff is also requesting two additional part time police officer positions be added to the authorized positions within the Police Department. A budget amendment in the amount of \$42,543 is proposed to provide funding for these positions. As mentioned above, 100% of the costs of this position will be reimbursed by the School Board. The police department has adequate funds in their current fiscal year budget to provide equipment and uniforms.

Staff requests that General Services Committee provide a favorable recommendation and forward to full Council for approval of the following:

1. Council adopt a Resolution authorizing the City Manager to sign the School Resource Officer Agreement with the Union County Board of Education.
2. Council authorize two additional part time police officer positions.
3. Council approve Budget Amendment BA-2020-20 to provide funding for the additional police officer positions that will be assigned to Union County Public Schools.

Committee Member McGee made a motion to recommend approval by Council to adopt a Resolution authorizing the City Manager to sign the School Resource Officer Agreement with the Union County Board of Education, authorize two additional part time police officer positions, approve Budget Amendment BA-2020-20 to provide funding for the additional police officer positions that will be assigned to Union County Public Schools and forward to full Council for approval.

Mayor Pro Tem Holloway seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 6. Budget Amendment for DOJ Grant for COVID-19 Expenses in Police Department.

David Morton, Police Captain requested a Budget Amendment to designate and appropriate funds for grant from the United States Department of Justice, Office of Justice Programs, Bureau of Justice Assistance for Coronavirus Emergency Supplemental Funding.

The Police Department has received a grant from the United States Department of Justice, Office of Justice Programs, Bureau of Justice Assistance. This grant is from the federal government in the amount of \$46,776. The grant is being provided for Coronavirus Emergency Supplemental Funding to be used for personal protective equipment (PPE) for the Monroe Police Department. There is not a match requirement for this grant. Council is requested to accept the grant and approve a budget amendment to designate and appropriate funds.

Committee Member McGee made a motion to recommend approval by Council to adopt Budget Amendment designating and appropriating the funds, authorize the City Manager to execute the grant agreement and forward to full Council for approval.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 7. Belk Tonawanda Phase 1-A Contract Award and Budget Ordinance.

Director of Parks & Recreation, Tonya Edwards presented a request to consider a recommendation to Council for the awarding of a contract in the amount of \$188,225 to Anson Contractors Inc. for the construction of Phase I-A of the Belk Tonawanda Park Expansion Project, and to approve a budget ordinance in the amount of \$55,897 for additional funds needed to complete this project.

A Budget Ordinance was approved in the amount of \$163,553 by Council on July 16, 2019 for the design and construction of a parking area, pedestrian path, and sign for a new entrance to Belk Tonawanda Park at 720 Charlotte Ave. Included in this amount was a consultant fee for the design and bid documents of \$17,725 leaving a total of \$145,828 for the construction of this project and the fabrication and installation of the sign. During the design phase, additional soil testing and surveying was needed with an associated cost of \$6,500 which reduced the available funds for the sign and construction to \$139,328. Bids were received from four contractors on May 28th for the construction of this project with Anson Contracting, Inc. providing the lowest bid in the amount of \$188,225. In addition, \$7,000 will be needed for the fabrication and installation of the entrance sign bringing the total cost for the project to \$219,450 and requiring a budget ordinance in the amount of \$55,897 to move forward.

Committee Member McGee made a motion to recommend approval of the award of the bid in the amount of \$188,225 to Anson Contracting, Inc., approval of the budget ordinance BO-2020-09, to authorize the City Manager to execute any and all necessary documents and forward to full Council for approval.

Committee Member Munn seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 8. Ertel Construction Inc. Contract Change Order #4.

Director of Energy Services, David Lucore presented a request to consider a \$549,327.00 reduction to the contract for Ertel Construction, Inc. to install a Natural Gas Pipe line to Edwards Wood Products.

Ertel Construction, Inc. was awarded a contract to construct a natural gas pipeline expansion to serve Edward Wood Products in two locations in Marshville. The project included the construction of 9,600 feet of 6-inch polyethylene pipe and 33,000 feet of 4- inch polyethylene pipe. Ertel Construction, Inc. was the low bidder and the contract was approved by City Council on October 1, 2019.

Since construction began on the project, Ertel Construction has struggled with the construction and after many setbacks, it has become clear that they are not fully equipped to complete the project as originally specified.

Ertel Construction and the City of Monroe have agreed that Ertel will complete the remaining 4" polyethylene pipe construction already underway and remove the 6-inch portion of the project from Ertel's contract. This will allow the Energy Services department to solicit bids on the remaining portion of the contract from the next 2 lowest bidders from last year.

Mayor Pro Tem Holloway inquired if the Director of Energy Services, David Lucore believed that the remaining \$549,327.00 would cover the remaining costs associated with installation of the 6-inch polyethylene pipe. Even though COVID-19 has affected construction costs throughout industry, Director of Energy Services, David Lucore felt confident that the remaining budget on the project will cover these costs.

Mayor Pro Tem Holloway made a motion to recommend the change order to Ertel Construction, Inc. and forward to full Council.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 9. Budget Ordinance for Additional Funding for Science Center Exhibits.

Director of Communication and Tourism, Pete Hovanec presented a request to approve a recommendation add \$100,000 from Occupancy Tax Capital Fund Balance to the project fund to continue securing exhibits. Also included in the proposed budget ordinance is the recognition of \$65,000 from miscellaneous donations designated for Science Center Exhibits.

Staff has received drawings and renderings regarding the Science Center and put the construction out to bid. HC Kern was the low bidder; and pending final approval from the LGC and City Council, the project will be awarded and construction will begin. Staff is working to develop the exhibit areas and raise the needed funds for the exhibit purchases. Staff has identified several exhibits that can be secured and be ready for installation over the next 12 months. These exhibits range from a topography box and electronic microscopes to gyroscopes and touchscreen anatomy tables. Staff would like to add \$100,000 from the occupancy tax capital fund to the project fund to secure as many exhibits as possible as construction nears completion.

The additional \$100,000 from Occupancy Tax Capital Fund Balance is only a portion of the total costs for the exhibits and represents the first steps in securing the needed exhibits. Additional corporate and private funds will be used to leverage this amount in the exhibit securing process.

The Tourism Development Authority unanimously approved the budget ordinance.

Mayor Pro Tem Holloway made a motion to recommend the approval of the budget ordinance allocation of \$100,000 from the occupancy tax capital fund balance to the project fund and \$65,000 in miscellaneous donations for securing exhibits for the Science Center and forward to full Council.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 10. Water and Sewer Connection Fee Assistance Program Request.

Finance Director, Lisa Strickland presented the Committee with a request for a sewer connection fee waiver from Ms. Dorothy Gaither, 217 E. East Avenue through the Water and Sewer Connection Fee Assistance Program.

In May of this year Ms. Dorothy Gaither/Ms. Lynn Price inquired about assistance to connect to City sewer. This item was on the July 21 Council agenda but the customer had a hardship worthy of expedited action and Staff needed a onetime exception to authorize immediate use of funds from the Water/Sewer Connection Assistance Program. This request for a sewer connection fee waiver is for Ms. Dorothy Gaither, 217 E. East Avenue through the Water and Sewer Connection Fee Assistance Program.

The purpose of the Water and Sewer Connection Fee Assistance Program is to provide assistance for utility customers that have low to moderate income and are in need to connect to City of Monroe water or sewer service due to a failing well or septic system. The Monroe-Union County Community Development Corporation screens all potential applicants and Isabelle Gillespie recommends Dorothy Gaither be considered for assistance in connecting to City sewer.

In addition to the City connection fees, Ms. Gaither would be required to have a plumber connect her home to the new sewer connection once it is installed. The Utility Assistance fund has a current balance of \$30,000. The balance available after fulfilling this request will be \$26,172.

Committee Member Munn asked why Ms. Gaither was not already connected to City sewer. Several potential reasons were offered: home was built before sewer was run, area was part of an annex, chose to remain on septic.

Finance Director, Lisa Strickland explained how the assistance program works and the role of the Monroe-Union County Community Development Corporation.

Committee Member McGee made a motion to recommend the approval of Dorothy Gaither be considered for assistance in connecting to City sewer and forward to full Council.

Mayor Pro Tem Holloway seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 11. Resolution Designating Depositories.

Finance Director, Lisa Strickland presented the Committee with a request to update the depositories designated as authorized for the Finance Officer to deposit funds of the City.

In accordance with North Carolina General Statute 159-31, the City has elected to deposit funds into financial institutions under the pooling method of collateralization of public funds. A resolution is attached to update the names of financial institutions that are authorized depositories for the City and are included on the North Carolina Department of State Treasurer's Pooling Bank List as of April 8, 2020.

Staff recommends the General Services Committee approve Resolution R-2020-48 Designating Depositories for the City of Monroe and forward to City Council for their approval.

Mayor Pro Tem Holloway made a motion to recommend approval of Resolution R-2020-48 Designating Depositories for the City of Monroe and forward to City Council for their approval.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 12. Budget Ordinance to Close Capital Projects.

Finance Director, Lisa Strickland presented a budget ordinance to amend the fiscal year 2021 budget in order to close various projects.

Many capital projects have been completed and are ready to be closed. Funding that is remaining in the following projects as unspent, netted against any project overruns, can be transferred back to fund balance in the corresponding fund with the exception of the airport project balances. The airport project balances are to be returned to the General Fund Formally Assigned Airport Grant Acceptance fund balance. Projects are as follows:

· GB1302 – Fire Station #4	\$ 4,404
· SR1936 – Quarry Sewer Line Repair	\$ 224
· SR1938 – ROW Debris Clearing	\$ (6,308)
· WR1636 – Catawba WTP Non-Cap Upgrade	\$ 381,667
· WR1801 – Franklin St Water Main Replacement	\$ 79,166
· WR1937 – Lake Lee Dam Repairs	\$ 257,671
· EL0404 – Highway 74 Bypass	\$ 996,986
· EL1602 – Westwood Underground Loop	\$ 25,000
· EL1901 – Additional Office Energy Service Building	\$ 20,404
· AP1501 – MALSR Improvements	\$ 267,830
· AP1502 – Bulk Storage Hangar Design	\$ 10,050
· AP1601 – Corporate Aircraft Hangar	\$ 31,557
· AP1801 – Airfield Lighting Rehab	\$ (144)

Mayor Pro Tem Holloway made a motion to recommend approval of the proposed budget ordinance to close projects for Fiscal Year 2021 and forward to full Council.

Committee Member Munn seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 13. Name Change for Rehab Development, Piedmont Buggy Works, MBW Landlord, LLC to Buggy Landlord, LLC.

Assistant City Manager, Brian J. Borne presented a request to consider and recommend to City Council a name change of the entity, MBW Landlord, LLC.

On February 5, 2019 City Council approved an incentive agreement with MBW Landlord, LLC to rehabilitate 514 Miller Street, the Buggy Factory. MBW Landlord, LLC and staff request consideration to change the name to Buggy Landlord, LLC. Both are North Carolina limited liability companies and have the same Managing Member, J. Patrick Reilly. The request is being made primarily for clarification purposes, due to another entity within their group having a similar name.

Committee Member McGee made a motion to recommend to City Council approval of the name change from MBW Landlord, LLC to Buggy Landlord, LLC on the current incentive grant agreement.

Mayor Pro Tem Holloway seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 14. Amendment #2 to Promissory Note for DP Monroe.

Finance Director, Lisa Strickland presented information to the Committee to request to authorize the City Manager to execute amendment #2 to the Promissory Note agreement with DP Monroe, LLC that was originally executed on December 28, 2010.

On March 29, 2009 the City entered into an agreement with Downtown Pioneers LLC to loan funds to assist in the rehabilitation of the Monroe Hardware Warehouse located at 101 N. Hayne Street. The building was renovated to create 26 upper floor residential units, with 13,000 square feet of leasable commercial space at street level. The original agreement was amended on May 1, 2014 to restructure the repayment period and add interest to be paid monthly. DP Monroe has made payments as scheduled.

DP Monroe has the opportunity to change the Warehouse into condominium units rather than rental units at this time. The developer is working to record the plat to will allow sale of each separate unit. The developer is also working to establish a condominium association and bylaws to outline the meetings, voting, proxies, assessments if needed, insurance coverage requirements and restrictions on the use of units and common areas. The developer has received multiple offers for the sale of several units, contingent upon proper approval to subdivide the property.

The City holds a Deed of Trust on the entire property and DP Monroe has requested a second amendment to the Promissory Note agreement that would allow for the partial release of the Deed of Trust when units are sold. The amendment requires that 75% of the settlement of the proceeds of each sale, up to \$100,000 be forwarded to the City. Monthly payments on the existing amortization schedule would be suspended when the amendment is executed until February 1, 2021. Any outstanding principal on February 1, 2021 will be reamortized and monthly payments will resume at the new calculated monthly amount including principal and interest. The entire Deed of Trust will be released once the outstanding principal has been paid in full. City Manager Faison has reviewed the loan modification, but was not involved with negotiations regarding this transaction to avoid any conflict of interest since this is his current residence.

Committee Member McGee asked if the building would retain its historic standing. Brian J. Borne, Assistant City Manager stated that it could change at any time which is why Nathan is wanting to sell these now and is also the reason for creating façade improvements for the condominiums. His tax credits have expired.

Committee Member Munn made a motion to recommend approval of Modification #2 of the Secured Note, authorize the City Manager to execute the agreement, and forward to full City Council.

Committee Member McGee seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Item 15. Budget Ordinance and Award of Bid for Wayfinding Signage Phase 2 & 3.

Brian J. Borne, Assistant City Manager presented a request to consider and recommend to City Council approval of award of bid for Wayfinding Signage Phase 2 & 3 and BO-2020-10.

Bids were solicited for the Wayfinding Signage Phase 2 & 3. Bids were received by the City of Monroe as follows and Staff and Bizzell Designs has reviewed and recommends award of the bid for this project to lowest bidder Lite Rite.

Lite Rite	\$ 283,485.30
Signs Etc.	\$ 289,185.75
United Signs	\$ 317,000.00

It is the recommendation of Staff and Bizzell Designs that General Services Committee recommend award of bid for Wayfinding Signage Phase 2 & 3 to Lite Rite and approval of BO- 2020-10, in the amount of \$61,937, to City Council and also authorize the City Manager to execute the contract on behalf of the City of Monroe. The item will be placed on the July 21, 2020 City Council Consent Agenda.

Committee Member McGee asked if phase 2 & 3 would include the Gateway signage. Brian J. Borne, Assistant City Manager replied that it does not include Gateway signage. The Gateway signage is on hold until funding becomes available.

Committee Member McGee made a motion to recommend awarding the bid for Wayfinding Signage Phase 2 & 3 to Lite Rite, approving of BO- 2020-10 in the amount of \$61,937 to City Council, authorizing the City Manager to execute the contract on behalf of the City of Monroe and forward to full City Council by placing the request on the July 21, 2020 City Council Consent Agenda.

Mayor Pro Tem Holloway seconded the motion, which unanimously passed with the following votes:

AYES: Chairman Keziah, Mayor Pro Tem Holloway, Committee Member McGee, Committee Member Munn

NAYS: None

Other:

Director of Parks & Recreation, Tonya Edwards informed the Committee (for informational purposes only) that the Senior Center qualifies for and will be applying for special funding offered by the Centralina Area Agency on Aging in the amount of \$14,496. The funds will be used to purchase a sanitizing machine to be used between classes during phase 3 of the shutdown. Afterward, it will be used nightly as a precaution. The machine price is around \$8,000 and 1 year of chemicals is \$4,000. The remaining \$2,500 will be used for extended subscriptions for virtual classes and additional personal protection equipment.

Finance Director, Lisa Strickland stated for informational purposes that the City is applying for a portion of CARES Act funding from Union County. She is working to create and submit a plan for the funding which must be all COVID-19 related expenses.

There being no further business the meeting was adjourned at 4:48 p.m.

Committee Chairman, Lynn Keziah



STAFF REPORT

TO: General Services Committee

VIA: Larry Faison, City Manager

DATE: October 15, 2020

FROM: Brian J. Borne, Assistant City Manager

PREPARED BY: Brian J. Borne, Assistant City Manager

SUBJECT: 311 E Jefferson Street, Parcel ID 09-231-246, Demolition

SUMMARY STATEMENT

General Services Committee is requested to consider a proposal to demolish former Community Shelter at 311 E. Jefferson, Parcel ID 09-231-246 and convert to public parking lot and potential future site for infill development.

REVIEW

On July 16 2019 (R-2019-41) City Council held a Public Hearing to designate the property eligible for economic development conditions to hold and later convey the property with conditions attached to encourage economic vitality, revitalization, foster community place, and eliminate slum and blight, per North Carolina General Statutes §158-7.1.

311 E. Jefferson, Parcel ID 09-231-246, formerly the Community Shelter, has been vacant since May/June 2019. Since vacant, the building has been a target for vandalism with windows and doors boarded due to break-ins. The facility is currently in need of roof replacement and has had water damage from broken pipes and would need mold eradication.

The development of the Monroe Science Center and the surrounding site improvements have transformed the Franklin Jefferson Gateway into Downtown and created a destination in Downtown Monroe. 311 E. Jefferson is strategically positioned enhance development of this corridor and provide needed public parking and potential future in-fill development that would complement the Downtown's eastern gateway of Franklin/Jefferson Streets.

Estimated costs associated with the demolition are:

Environmental Site Assessment (ESA) Phase 1	\$ 4,200.00
Abatement/Underground Storage Tanks (USTs)	\$35,000.00
Demolition	<u>\$35,000.00</u>
Total	\$74,200.00
10% Contingency	<u>\$ 7,420.00</u>
Grand Total	\$81,620.00

A Budget Ordinance, BO-2020-17, is needed to fund the \$81,620.00 and included for your consideration.

Estimate for constructing a new public parking lot is \$238,220.00. Funding of the construction would be proposed in the FY 2022 CIP budget process.

RECOMMENDATION

Staff requests General Services Committee recommend City Council approve BO-2020-17, To fund the ESA Phase 1 and demolition of 311 E. Jefferson, Parcel ID 09-231-246, to construct a public parking lot to benefit Downtown and the adjacent Science Center and potential future site for in-fill development.

**CITY OF MONROE, NORTH CAROLINA
CAPITAL PROJECT BUDGET ORDINANCE
DEMOLITION OF 311 EAST JEFFERSON STREET
BO-2020-17**

WHEREAS, the Community Shelter was previously located at 311 E Jefferson St and vacated this location in June 2019; and

WHEREAS, this property has been vacant since the Shelter moved out and has become a target for vandalism and break-ins; and

WHEREAS, the facility is in need of extensive repairs to replace the roof, replace broken windows, repair water damage from water leaks and mold eradication; and

WHEREAS, staff is recommending demolition of the structure at this address for and estimated cost of \$81,620 including contingency.

NOW, THEREFORE, BE IT ORDAINED that the City Council of the City of Monroe establishes a capital project for the purpose of demolition of the structure at 311 E Jefferson St and appropriates Unassigned Fund Balance to fund this project.

General Fund:

Revenue:

Appropriation from Fund Balance	\$81,620
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Expense:

Transfer to General Capital Project Fund	\$81,620
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General Capital Project Fund:

Revenue:

Transfer from General Fund	\$81,620
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Expense:

Demolition of 311 E Jefferson St	\$81,620
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Adopted this 3rd day of November, 2020.

Bobby G. Kilgore, Mayor

Attest:

Bridgette H. Robinson, City Clerk



STAFF REPORT

TO: General Service Committee

VIA: E.L. Faison, City Manager

DATE: October 15, 2020

FROM: Lisa Stiwinter, Planning and Development Director

PREPARED BY: Tom Brown, Chief Building Inspector

SUBJECT: Budget amendment for the associated costs to complete the Planning and Development Permitting, Planning and Code Enforcement software installation and training.

SUMMARY STATEMENT

City Council is requested to consider a budget amendment in the amount of \$103,975 for the City's permitting, plan review and inspections software.

REVIEW

City Council voted to award CityView as the permitting, plan review and inspections software vendor in the amount of \$318,772 at their January 2018 meeting. CityView was the selected software vendor because it offered a Planning, Code Enforcement and Permitting module that would handle all permitting, plan review, inspections, and code violations for the Planning and Development Department. CityView was also selected due to its capability to integrate with Laserfiche Document Management (document storage), ESRI GIS (Geographic Information Systems-data mapping) and BlueBeam Revue (plan review software), which are all currently being utilized by the Planning and Development Department.

Funding for CityView software consisted of licensing, installation and maintenance. Maintenance fees for two prior years (FY 2019 and 2020) were inadvertently deducted from the installation purchase order which has created a shortage on the final payment to CityView. The money from the maintenance fees was returned to fund balance at the end of the prior fiscal years. This has created a budget shortfall in the amount of \$64,075. Funding is also needed for two change orders. The first for \$36,750 is needed to cover data conversion, code enforcement's

minimum housing work flow and additional items for permitting including extra letters. The second in the amount of \$3,150 is needed to cover workflow for permitting for kiosks, change of use and home daycares. A Budget Amendment in the amount of \$103,975 is proposed to cover the total of these costs.

RECOMMENDATION

The General Services Committee is requested to consider the proposed budget amendment in the amount of \$103,975 for the permitting, plan review and inspections software.

Attachment(s):
Scope Document
Change Order 1: Budget
Validation Testing
Change Order 2: Workflow
changes
BA-2020-29



CITY OF MONROE, NC

IMPLEMENTATION OF CITYVIEW

SCOPE DOCUMENT

MARCH 1, 2020

VERSION 1.7



VERSION CONTROL

Version #	Date of Issue	Author(s)	Description
1.0	April 8, 2018	Jatinder Chadha	Initial Version
1.1	September 21, 2019	Susan McCormick	QA – revised template
1.2	October 16, 2019	Douglas Thorsteinson	Update to current template format
1.3	November 6, 2019	Susan McCormick	QA
1.4	December 23, 2019	David Hill	Final for Review
1.5	January 21, 2019	David Hill	Accepted changes from Review
1.6	February 13, 2020	David Hill	Final Updates for QA Review
1.7	March 1, 2020	Susan McCormick	QA

TABLE OF CONTENTS

1	INTRODUCTION.....	5
2	SIGN OFF.....	6
3	PROPERTY INTEGRATION.....	7
3.1	Property Integration Datasets.....	7
3.2	Property Routine Load (Scheduled Process).....	8
4	DATA CONVERSION	9
4.1	Data Conversion Assumptions	9
4.2	Legacy Data.....	9
4.3	Out of Scope Data Conversion.....	10
5	SECURITY	11
5.1	Security Configuration.....	11
5.2	Infrastructure.....	11
6	MODULE CONFIGURATION: PLANNING	12
6.1	General Configuration	12
6.2	Activity Workflow.....	12
6.3	Letters.....	13
6.4	Fees	15
6.5	Reports.....	16
6.6	Scheduled Processes.....	16
6.7	Out of Scope Activities.....	16
6	MODULE CONFIGURATION: PERMITS & INSPECTIONS.....	17
7.1	General Configuration	17
7.2	Activity Workflow.....	17
7.3	Letters.....	17
7.4	Fees	19
7.5	Reports.....	19
7.8	Alerts.....	22

8	MODULE CONFIGURATION: CODE ENFORCEMENT	24
8.1	General Configuration	24
8.2	Activity Workflow	24
8.3	Letters	25
8.4	Reports	26
8.5	Alerts	26
8.6	Out-of-Scope Activities	27
9	MODULE CONFIGURATION: CASHIERING	28
9.1	General Configuration	28
9.2	Cashiering Settings	28
9.3	Letters	28
9.4	Reports	29
9.5	Out-of-Scope	29
10	MODULE CONFIGURATION: PROPERTY INFORMATION	29
10.1	General Configuration	29
11	INTEGRATIONS AND CUSTOMIZATIONS	30
11.1	GIS/Mapping Integration	30
11.2	Online Payment Gateway	30
11.3	Laserfiche (EDMS)	30
11.5	LDAP	32
11.6	Customizations	32
12	SCHEDULED PROCESSES	33
13	CITYVIEW MICROSOFT ADD-INS	33
14	MISCELLANEOUS	33

1 INTRODUCTION

The purpose of this document is to record the outcome of the Process Mapping sessions that took place with the Building, Code Enforcement, Planning and Cashiering Department Subject Matter Experts. The Process Mapping sessions were for: lookup values, fees, letters, workflow-specific values, reviews, inspections, submittal requirements, expiration dates and processes, violations and corrections codes, and other related values for Permits & Inspections, Planning, Code Enforcement and Cashiering. This document will be used by the CityView Implementation Team as a guide to what deliverables are required for the City of Monroe, NC's implementation.

For reference, this is the summary of the original scope of the project:

- CityView Modules & Add-ins:
 - Property Information, Permits & Inspections, Planning, Code Enforcement, Cashiering, and Electronic Plans Review
 - CityView Portal for Property Information, Permits & Inspections, Planning and Code Enforcement
 - CityView Mobile for Permits & Inspections and Code Enforcement
- Integrations & Customizations:
 - Property integration to GIS
 - Esri ArcGIS Server mapping extension, EDMS extension (Laserfiche), MS Outlook Add-in, MS Word Add-in,
 - Integration with InvoiceCloud
- Data Conversion
 - Permitting data from Sunguard/HTE

2 SIGN OFF

By signing this document, the Subject Matter Experts of the City of Monroe, NC are agreeing that the scope of work described herein represents the scope of Permits & Inspections, Planning, Code Enforcement and Cashiering configuration that CityView will undertake as the total amount of work as agreed to in the terms of the contract between the two parties.

Qualification: It is unrealistic to expect the Subject Matter Experts to have identified every one of their business requirements during Process Mapping; therefore, it is expected that changes shall be requested during the life of the project. However, we do expect both parties to apply an element of reasonableness to this process. As long as those changes do not require any customization of the software, and can be made without requiring unreasonable rework of completed configuration, they shall be covered under the Validation and Fine Tuning phase of the project. Please note: if requests amass in excess of what is reasonable and the requirements become something of a moving target, then change orders shall need to be considered.

Data Security and Privacy: By signing this page you are also acknowledging that any concerns your organization has around data security and privacy have been discussed with your project team and appropriate documents (e.g. non-disclosures) have been signed.

Final Approved Document: Monroe Scope Document Final.pdf

CityView Project Manager

City of Monroe, NC Project Manager



David Hill Project Manager

Lisa Stiwwinter

Date _____

Date 4-6-2020

3 PROPERTY INTEGRATION

Property Integration consists of two primary parts: data mapping and data integration/load. The property data mapping will be reviewed by the CityView Data Conversion Team and the City of Monroe, NC Team prior to integration. The Property Data Mapping Document details the approved data field mapping and planned property integration for the City of Monroe, NC's property data.

Property Data Mapping Document: 12360 - CityView Property Information and Integration Workbook- Final.xls

There will be only one source of data identified for the property integration datasets: address data, parcel data, and owner data.

The Monroe, NC has decided they will NOT include the following additional data elements in their property integration: Parent Parcel Information, Parks, Park Elements, Roads, Road Segments, Structures, Structure Types, Trails, Trail Landmarks, and Zoning.

3.1 Property Integration Datasets

Monroe's IT Team sent the following files to us on Aug 1 2018, which was a cut off the data from their GIS system:

- Parcels_080118.shp
- Parcels_080118.dbf
- Parcels_080118.cpj

City of Monroe's GIS Team will prepare a View (ViewC2Parcels) in their GIS database, to which CityView will have Read access to, with following fields:

```
CCTNO
,PIN
,Legal1
,Legal2
,Legal3
,Land_AreaN
,Sale1D
,Sale1Amt
,Sale2D
,Sale2Amt
,Sale3D
,Sale3Amt
,Doc1Ref
,Doc2Ref
,Doc3Ref
,LandDes1
```

```
,Acres  
,JurNum  
,Master_Are  
,DistNum  
,CorpId  
,ZoneDesc  
,TotVal1  
,TotVal2  
,TaxLand1  
,TaxLand2  
,TaxDwlg1  
,TaxDwlg2  
,TaxTot1  
,TaxTot2  
,LandVal1  
,PCDesc  
,PropClas  
,SecPlat  
,TaxAcct
```

3.2 Property Routine Load (Scheduled Process)

Subsequent to Go Live, property information will be updated within CityView through a scheduled process. As part of the CityView property data integration process, a scheduled process is created to update the CityView property data from the City of Monroe's source datasets (ViewC2Parcels) as explained in the previous section.

City of Monroe has elected to run the scheduled process, "Property Updates", Nightly at 7 PM. The City will be able to alter this configuration after Go Live, if necessary

Scheduled processes must be run at times of the day or night that will not interfere with users who are in the system, backups that may be scheduled to run against the CityView database or on the same server, and other processor-intensive operations such as full virus scans running on the server.

4 DATA CONVERSION

Data conversion will commence once both Parties are comfortable with the output of the data mapping exercise. CityView's specialist will create the scripts that parse, derive, and translate the source data into the ideal format for CityView. To reduce the time and effort associated with this step CityView requires that the City provide data in one of the following formats: SQL Server .bak, .mdb, .dbf, or .txt. Since the legacy data source is Sunguard, the assumption is SQL Server .bak will be provided. The initial data conversion will run the scripts to provide a means for verification of correctness during the Validation stage of the project.

CityView will complete a final iteration (using the same scripts) immediately prior to go-live.

4.1 Data Conversion Assumptions

Data migration services are priced based on the following general assumptions:

1. Data has been cleaned according the suggested guidelines.
2. Both Parties have reviewed and signed off data mapping before proceeding to data conversion.
3. CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training, and one complete refresh at go-live. CityView will make all other fixes using targeted scripts. CityView can perform additional complete refreshes if the Parties mutually agreed through a written change order.
4. City provides data in one of the required formats: SQL Server .bak or .mdb.
5. CityView will complete the final iteration using the same scripts. Should changes occur that affect the scripts, a change order will be required prior to any delivery.

4.2 Legacy Data

CityView is not responsible for the viability of the legacy data that will be migrated into CityView. It is expected that the City shall clean the legacy data to resolve data inconsistencies, inaccuracies, and incompleteness prior to data conversion runs, so that these issues are not be migrated to CityView. This will help reduce data conversion issues that might arise, such as incompatible data formats between the legacy data and the mapped CityView tables and fields. When identified, the CityView Data Conversion team will provide guidance on legacy information that needs to be cleaned. The CityView Data Conversion team is not responsible for the legacy data accuracy and completeness.

It is also expected that during Project validation and other testing opportunities, the City verifies that legacy records, which have been converted into CityView, are sufficiently accurate for historical reference and can be advanced through the configured CityView process. It is essential that any issues related to this are discovered and addressed well before Go Live.

Data Mapping Document: 12360 MonroeNC DataConversionDoc.v1.4

The process to be followed shall be:

- CityView will analyze the Sunguard/HTE data to identify Sunguard/HTE custom fields and to determine where data cleansing by City of Monroe may be necessary.
- CityView and City shall collaborate to create the data mapping document.
- City personnel will review and approve the Data Mapping documents.
- CityView will create data migration routines to include additional mapping for Sunguard/HTE custom fields and to translate Sunguard/HTE lookup values to CityView lookup values.
- City shall clean their data to address data viability issues identified during data mapping.
- During the project validation phase, City business users will continue to review the migrated data and provide feedback to the Data Conversion team.
- CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training, and one complete refresh at Go Live. CityView will make all other fixes using targeted scripts. CityView can perform additional complete refreshes if the parties mutually agree through a written change order.

Go Live is typically scheduled on the first business day of the week. In order to prepare the CityView system for Go Live and allow adequate time for database transfers and software installation, the data conversion is usually executed on the preceding Wednesday or Thursday. Any data entered into the legacy system after the final copy has been delivered to CityView for the final conversion will not be migrated into CityView. The City will need to manually enter this data into CityView or leave it in the legacy system which will serve as a reference system for this data.

The City is responsible for validation of the converted data. If there is no evidence that this has been tested prior to the Go Live, then CityView reserves the right to postpone the Go Live and raise applicable change orders.

4.3 Out of Scope Data Conversion

There are no out of scope items with respect to the data conversion; however, there are new fields being added after the initial data mapping due to the extensive work items identified during data collection which have generated additional work beyond what was initially expected; additional effort will be added to the Budget Validation document to reflect this unexpected work.

5 SECURITY

5.1 Security Configuration

Implement user security settings according to customer completion of the roles and permissions workbooks. These Organizational Roles workbooks define the out-of-the-box roles and permissions inherent in the solutions. The permissions are defined in:

- [Employee Security Workbook – FINAL.xls]

More information about the out-of-the-box organization roles can be found on CityView Connect:

<http://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/cityview-manuals/system-administration-with-cityview-manager/security/1233-organization-roles?highlight=WyJvcmdhbml6YXRpb24iLCJvcmdhbml6YXRpb24ncyIsInJvbGVzliwcm9sZXMnliwib3JnYW5pemF0aW9uIHJvbGVzIl0=>

Please note: it is imperative that the Code column (B) on the Employee Details tab matches the users' Active Directory login name (i.e. the username used to log onto their machine.) If the CityView Development Team configures the security settings per the information provided in the workbook, and it turns out that these are not the user's Active Directory login names, the rework is significant and shall require a change order.

5.2 Infrastructure

CityView Workspace, CityView Portal and CityView Mobile are modern, browser-based applications. Please consult CityView Connect for latest supported browsers and devices.

<http://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/supported-technologies>

CityView will also require that these websites be run under SSL (https). IT departments should be prepared to apply a proper SSL certificate (not self-signed) to both of these websites. Documentation can be provided upon request if more information is required.

6 MODULE CONFIGURATION: PLANNING

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

6.1 General Configuration

Configuration of CityView Planning and Planning Portal using the information collected in the workbooks. This will include the following

- Lookup table data
- Custom data fields specific to the Planning types being tracked through the system
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out of the box sub-workflows based on the City's requirements.
- Refinement of the CityView Select scheduled process for planning application expirations.

General configuration is defined in:

- CityView Select Planning Workbook – FINAL.xls

6.2 Activity Workflow

The in scope CityView Select workflows and custom workflows are listed below.

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Planning: Pre-consultation and Intake (main Planning workflow)	In Scope
Planning: Circulation and Review (re-circulation) (sub-workflow)	In Scope
Planning: Circulation and Review (no re-circulation) (sub-workflow)	[Not to be Used]
Planning: Appeal Process (sub-workflow)	In Scope
Planning: Administrative/Staff Approval (sub-workflow)	In Scope
Planning: Commission Approval (sub-workflow)	In Scope
Planning: Council Approval (sub-workflow)	In Scope
Planning: Hearings/Agendas (sub-workflow)	[Not to be Used]
Planning: Heritage Board (sub-workflow)	In Scope
Planning: Pre-Application (sub-workflow)	In Scope
Planning: Revisions Process (sub-workflow)	In Scope
Planning: Agreement Process (sub-workflow)	[Not to be Used]
Planning: Service Agreement (sub-workflow)	[Not to be Used]
Planning: Upload Review (sub-workflow)	In Scope
Planning: Zoning Board of Appeals (sub-workflow)	In Scope

Planning: Add Default Inspections (sub-workflow)	[Not to be Used]
Planning: Inspection Template (template)	[Not to be Used]
Planning: Review Template (template)	In Scope

6.3 Letters

Configuration of 10 letter templates for Planning.

The following letters have been identified in the workbook:

Template Name	Code	Trigger/activity that adds letter	Code	In Scope / Not to be Used
Adjacent Owner Circulation	PL00037	Generate Property Owner Notice Generate & Distribute Notice of PC Meeting Generate & Distribute Notice of Council Meeting	PL00039 PL00042 PL00051	In Scope
Administrative Approval Letter	PL00024	Generate & Send Notice of Staff Approval	PL00067	In Scope
Application Accepted Letter	PL00011	Generate Complete Application Notice	PL00010	In Scope
Hearing Notice Postcard	PL00085	Not used in any OOTB workflows		Not in scope
Bond Release Letter	PL00068	Not used in any OOTB workflows		In Scope
Construction Authorization	PL00074	Generate Construction Authorization Letter	PLC200014	Not in scope
Agreement Cancellation Notice	PL00075	Generate Agreement Cancellation Notice	PLC200022	Not in scope
Inspection Report (Agreement)	PL00076	Generate Inspection Report	PLC200026	Not in scope
Notice of Administrative Denial	PL00030	Generate & Send Notice of Staff Denial	PL00106	In Scope

Notice of Decision	PL00038	Generate & Send Notice of PC Decision Generate & Send Notice of Council Decision Generate Notice of ZBA Decision	PL00046 PL00055 PL00101	In Scope
Notice of Determination	PL00032	Generate & File Notice of Determination with County	PL00062	In Scope
Notice of Final Decision	PL00033	Generate & Send Final Notice of Decision	PL00063	In Scope
Notice of Incomplete Application	PL00020	Generate/Send Notice of Incomplete Application	PL00008	In Scope
Notice of OTC Decision	PL00065	Generate/Send Notice of Decision	PL00007	
Notice of Public Hearing	PL00069	Generate Notice of Hearing (Heritage Board workflow) Generate & Distribute Notice of ZBA meeting (ZBA workflow)	PL00108 PL00097	In Scope
Planning Agency Circulation	PL00034	Generate & Send Circulation Notice Generate & Send Recirculation Notice	PL00074 PL00075	In Scope
Planning Hearing Agenda	PL00044	Generate Agenda (Hearings/Agendas workflow)	PL00078	In Scope
Planning Review Corrections	PL00031	Generate Notice of Revision Generate Notice of Revisions Generate Resubmittal Request	PL00066 PL00102 PL00049	In Scope
Staff Report	PL00086	Generate Draft Staff	PL00104 PL00072	

		Generate Draft Staff Report (Verify Final Review Status)		
Zoning Compliance Letter	PL00070	Not used in any OOTB workflows		In Scope
Zoning Verification Letter	PL00087	Not used in any OOTB workflows		Not in scope
Nothing OOTB		Generate Meeting Summary for Applicant	PL00005	Not in scope
New Planning Application from Portal (Email)	E002	When new application is submitted on Portal (DomainEntityCreate rule)		In Scope
Plan Review Outcome Notice (Email)	PLON	Email Applicant that Permit is Approved (Permits and Inspections Building: Main Process workflow)		Not in Scope
Staff Level Historic District COA				Not in Scope
Staff Report-Annexation				Not in Scope
Staff Report-Appeal				Not in Scope
Staff Report-Historic District COA-Board Level				Not in Scope
Staff Report-Historic Landmark Designations Staff Report-Rezoning Simpson Farms				Not in Scope
Staff Report-Special Use Permit				Not in Scope
Staff Report-Variance				Not in Scope
Tax Assessors Letter				Not In Scope
Zoning Verification Letter				Not In Scope
COA Card				Not In Scope
TOTAL IN SCOPE LETTERS:				15

6.4 Fees

Fees for Planning are identified in the workbook and in the following documents provided:

- CityView Select Planning Workbook v2.0

6.5 Reports

CityView out of the box reports are provided for Planning. No additional reports are included. Additional reports will require a Change Order.

Project Applications	Escrow (By Revenue Account #)
Planner Projects	Deposits and Bonds Summary
Outstanding Plan Reviews	Submittals Report (Sorted by Planner)
Project Fees	Project Expirations
Expired Projects	Monthly Project Status Report (sorted by Project Number)
Planning Activities	Monthly Project Status Report (sorted by Date Entered)
Plan Review Time	Land Developer Review Log
Scheduled Hearings	Development Review Status (with maps)

6.6 Scheduled Processes

The following out-of-the-box scheduled processes will be configured (enabled and scheduled) as part of this project:

PL Expire Planning Applications	ENABLE
---------------------------------	--------

6.7 Out of Scope Activities

Any custom text or statement on the planning application (paper application) are out of scope.

There are 5 additional letters than were in the contract.

6 MODULE CONFIGURATION: PERMITS & INSPECTIONS

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

7.1 General Configuration

Configuration of CityView Permits & Inspections and Permits & Inspections Portal using the information collected in the workbooks. This will include the following

- Lookup table data.
- Custom data fields specific to the permit being tracked through the system.
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out of the box sub-workflows based on the City's requirements.
- Refinement of the CityView Select scheduled processes for permit expirations. See section 7.5.

General configuration is defined in:

- 12360-CityView Select Permits and Inspections Workbook – FINAL.xls

7.2 Activity Workflow

The in scope CityView Select workflows and custom workflows [only if applicable] are listed below.

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Permits and Inspections Building: Main Process	In Scope
Permits and Inspections Building: Main Process Default Inspections Template	In Scope
Permits and Inspections Building: Main Process Default Reviews Template	In Scope
Permits and Inspections Building: Permit Expiration	In Scope
Permits and Inspections: Simple Inspections Template	Not to be Used
Permits and Inspections Building: Deposits and Bonds (sub-workflow)	In Scope
Permits and Inspections Building: Main Process Upload Review	In Scope
Permits and Inspections Building: Condition Document Submitted	Not to be Used

7.3 Letters

Configuration of 10 letter templates for Permits and Inspections.

The following letters have been identified in the workbook:

Template Name	Code	Trigger/activity that adds letter	Code	In Scope / Not to be Used
Permit Review Corrections Notice	PR00059	Generate/Send Correction Notice	PR00048	In Scope
Incomplete Permit Application	PR00063	Generate/Send Incomplete Application Notice	PR00045	In Scope
Permit – Detailed	PR00073	Generate/Issue Permit	PR00054	In Scope
Certificate of Completion	PR00067	Generate/Issue Certificate of Completion	PR00006	In Scope
Certificate of Occupancy	PR00021	When user clicks Print button in the Occupancy panel.		In Scope
Inspection Report	PR00062	When user completes an inspection.		In Scope
Special Event Permit	PR00081	Generate/Issue Customer Services Permit (Special Events workflow)	PR00116	Not to be Used
Permit Expiration Notice	PR00095	Generate/Send Expiration Warning Notice Generate/Send Expiration Notice	PR00007 PR00008	In Scope
Bond Release Letter	PR00096	Generate Bond Release Letter (Deposits and Bonds workflow)	PR00117	Not to be Used
Cancellation Notice (Email)	PR20	After Waiting for Resubmittal activity expires ("Cancelled").	PR00052	Not to be Used
Plan Review Outcome Notice (Email)	PLON	Email Applicant that Permit is Approved (Permits and Inspections Building: Main Process workflow)		Not to be Used
Utility Release (Email)	PR16	Business rules when Utility Finals are passed.		Cannot be included in scope; possibly include at a later date
New Application from Portal (Email)	E001	When new permit application is submitted on Portal (DomainEntityCreate rule)		In Scope
Inspection Canceled (Email)	ICAN	Business rules when inspection request is cancelled.		In Scope
Inspection Requested (Email)	IREQ	Business rules when inspection is requested.		In Scope
Inspection Scheduled (Email)	ISCH	Business rules when inspection is scheduled.		In Scope
Permit Job Card (Nothing OOTB)		After permit is issued and inspections are generated		Cannot be included in scope; possibly include at a later date
TOTAL IN SCOPE LETTERS:				11

7.4 Fees

Fees, to be configured, are identified in the workbook (tab 24a, 24b) and in the document provided:

- 12360-CityView Select Permits and Inspections Workbook – FINAL.xls

7.5 Reports

CityView out of the box reports are provided for Permits & Inspections. No additional reports are included. Additional reports will require a Change Order.

Outstanding Fees	Permit Turn-Around
Fee Paid in Full	Application Review Tickler
Inspection Outcome	Building and Safety Revenue Report
Inspection Schedule	Certificate of Occupancy Listing
Inspections by Inspector	Deposits and Bonds Summary
Average Daily Inspections	Escrow (By Revenue Account #)
Inspections To Do	Review – Decision Date
Permit Status Summary (By Status)	Permit Turn-Around Detail Report
Permit Status Summary (By Type)	Permit Time Spent
Permit Status Summary (By Contractor)	Public Works Permit Status Summary
Permit Value	

7.5 Scheduled Processes

The following out-of-the-box scheduled processes will be configured (enabled and scheduled) as part of this project:

Check Invalid Licenses	ENABLE
Permit Expiration: Add General Expiration Warning Notice Activity	ENABLE
Permit Expiration: Add Generate Expiration Notice Activity	ENABLE
Permit Expiration: Set Permit Status to Expired	ENABLE
Permit Expiration: Add Progress Inspection Activity	DISABLE

7.6 Additional Configuration / Notes

- Trade Permits are to be issued along with Building permit, i.e. CityView configuration will be Single Application with Multiple permits – ALL issued together.
- Residential New House – Only Building sub permit will be on the application, no trade permits.
- Lien Agent: Custom field will be created to get the name and address of the Lien Agent for certain applications, if Total valuation of the application exceed \$30,000 like
 - o Commercial – Addition, Interior Renovation, Parking lot, Cell Tower, New Construction
 - o Residential – Renovation, Pool
- Custom field required for "Work Started without Permit", which will be a Boolean field – If this is "True / Yes", then the permit fee will be doubled, fee adjustment set will be created.
- City has requested us to create the custom fields as they are appearing on their application (See note under "out of scope activities", section 7.7).
- Permit Fee:
 - o Configuration of fee – This will be based on the fee schedule submitted.
 - o Residential and Non-Residential will have separate fee sets.
 - o Commercial fee calculation is *as per the International Building Code*, as appearing on the fee schedule. There is a table in CityView, which stores the rate for the Occupancy and Construction type.
 - o Fee are to be generated *after* reviews are completed. The only fee, to be generated, at the time of application is the Plan Review fee as identified in the fee schedule.
- Create a custom field for Fence "Is the fence height greater than 6 Feet?" Yes / No. If Yes, issue Building and Zoning Permit, otherwise only Building permit.
- Storm Water
 - o Do not charge fee based on certain City identified criteria provided prior to validation
 - o Same for Driveway.
 - o Custom fields identified (highlighted) from the document Stormwater Mgmt Permit Application.doc
- Erosion Control
 - o Custom field for field "Approximate date disturbing activity will commence"
- Create a custom field to store Sub Division.
- New Contact Type:
 - o Gas Company
 - o Power Company
- Review Activities
 - o In the data collection document, it is indicated, that the date required should be between 10-14 days. We made it clear that it cannot be a date range it has to be a fixed deadline i.e. either 10 or 14. After confirming via email dated 09 Sept 2019, we will set the date required as 10

Business days and if it is required to be extended, users will extend the date manually. This will be part of the EUT, where the staff will be trained on various aspects of CityView application.

Miscellaneous Configuration:

Following text is to be printed on Permit (based on the application indicated)

As-Built Survey Required: (Building Permits)

AN AS-BUILT SURVEY SHALL BE REQUIRED FOR ALL NEW, EXPANDED, OR RELOCATED STRUCTURES WHICH SHALL ACCURATELEY SHOW THE FOOTPRINT OF THE STRUCTURE, APPURTENANCES, ALL EXISTING STRUCTURES, APPLICABLE SETBACKS, AND PROPERTY BOUNDARY LINES PRIOR TO THE RELEASE OF ANY CERTIFICATE OF OCCUPANCY.

Foundation Survey (SF Residential)

FOR SINGLE FAMILY RESIDENTIAL USES, A FOUNDATION SURVEY SHALL BE REQUIRED NO LATER THAN 10 DAYS AFTER THE FOUNDATION HAS BEEN POURED.

Zoning Inspection (For C.O.)

ALL ZONING REQUIREMENTS MUST BE INSPECTED BY THE ZONING OFFICER PRIOR TO REQUESTING A CERTIFICATE OF OCCUPANCY IF REQUIRED. PLEASE CALL 704.282.4524 TO SCHEDULE A ZONING INSPECTION.

Zoning Inspection (No C.O.)

A FINAL ZONING INSPECTION IS REQUIRED. PLEASE CALL 704-282-4524 TO SCHEDULE A FINAL INSPECTION ONCE THE PROJECT IS COMPLETE

- Zoning Inspections are required at the completion of the project.
- As-built Surveys are for commercial projects and are required at the completion of the project
- Foundation Surveys are for the residential uses and are required 10 days after the foundation is poured (ideally we'd have this before the next building inspection)

7.7. Out-of-Scope Activities

Letters: There is 1 additional letter than was in the contract

Custom Fields

The City has requested us to create the custom fields as they appear on their application(s). There are approximately 18 application forms, each with their own set of custom fields, some of them appearing at the Application level and a few that will have to be created at the Work Item level. See the document "List of attributes from application type.xls" containing the list of custom fields required. The ones highlighted in yellow

(10) will be created as part of standard configuration, it was discussed and agreed that CityView will only create 10 custom fields at no additional cost. All others will be considered out of scope.

For the custom application fields, all Applications have been provided; we will require additional clarity on multi-use application forms and identify what types of applications they are appropriate for.

If requesting new, additional, or upgrade of existing services please check the appropriate utility and give a brief explanation: Water ☒ Sewer ☒

Will this require a new water tap? Yes ☒ or No ☐ Size water tap needed _____
 Will this require a fire line? Yes ☐ or No ☐ Size fire line needed _____
 Will this require an irrigation tap? Yes ☐ or No ☐ Size irrigation tap needed _____
 Will this require a new sewer tap? Yes ☒ or No ☐ Size sewer tap needed _____

Will these taps be City or Contractor installed (please specify)? CITY

Will this require a live tap? _____

Reports

Report samples were submitted as part of data collection exercise, however, per the contract custom reports are out of scope. We have submitted samples of the out of the box reports to the City.

There are two letters which we Monroe has decided not to do at this time; further discussion after testing the system as to what function they have may be included in a future change order:

- Utility Release (Email) PR16 - Business rules when Utility Finals are passed.
- Permit Job Card (Nothing OOTB) - After permit is issued and inspections are generated

7.8 Alerts

There is one out-of-the-box Permits and Inspections alert that is configured for this system. When a Stop Work Order has been issued, an alert is automatically placed on the property. Once the Stop Work Order is resolved, the property alert will automatically be removed from the property.

No specific additional alerts have been defined, or are in scope for the Permits & Inspections module.

8 MODULE CONFIGURATION: CODE ENFORCEMENT

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

8.1 General Configuration

Configuration of CityView Code Enforcement and Code Enforcement Portal using the information collected in the workbooks. This will include the following

- Lookup table data.
- Custom data fields specific to the Code Enforcement case types being tracked through the system.
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out of the box sub-workflows based on the City of Monroe's requirements.

General configuration is defined in:

- CityView Select Code Enforcement Workbook – FINAL.xls

8.2 Activity Workflow

The in scope CityView Select workflows and custom workflows are listed below.

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Code Enforcement – Attach Pictures (sub-workflow)	In Scope
Code Enforcement – Abatement (sub-workflow)	In Scope
Code Enforcement – Citation (sub-workflow)	In Scope
Code Enforcement – New Case Workflow	In Scope
Code Enforcement – Portal Complaint (sub-workflow)	In Scope
Code Enforcement – Summons (sub-workflow)	In Scope
Code Enforcement – Commercial Fire Inspection	Not to be Used
Code Enforcement – ADJ (sub-workflow)	Not to be Used
Code Enforcement – Agency Reviews (inspection template)	Not to be Used
Code Enforcement – Animal Complaint	Not to be Used
Code Enforcement – Animal Picked-Up (sub-workflow)	Not to be Used
Code Enforcement – Animal Quarantine (sub-workflow)	Not to be Used
Code Enforcement – Dangerous Dog (sub-workflow)	Not to be Used
Code Enforcement – Dog Bite	Not to be Used
Code Enforcement – Fire-Safety Inspections	Not to be Used
Code Enforcement – Minimum Housing	See Out-Of-Scope section 8.5

8.3 Letters

Configuration of 10 letter templates for Code Enforcement.

The following letters have been identified in the workbook:

Template Name	Code	Trigger/activity that adds letter	Code	In Scope / Not to be Used
Abatement Invoice	CE00097	Generate Invoice for Services	CE00085	Not to be Used
Administrative Citation	CE00079	Generate Citation/Record Delivery Generate 2 nd Citation/Record Delivery (Citation workflow)	CE00030 CE00032	Not to be Used
Declaration of Intent to Vacate and Demolish	CE00072	Generate Order to Demolish (new workflow)		Not to be Used
Notice of Abatement	CE00069	Generate Notice of Abatement (Abatement workflow)	CE00086	Not to be Used
Notice of Violation	CE00062	Generate NOV/Record Delivery Generate Notice/Record Delivery Generate NOV/Record Delivery Send NOV/Record Delivery Generate NOV/Record Delivery	CE00014 CE00021 CE00040 CE00043 CE00074	Not to be Used
Notice to Complainant	CE00099	Notify Complainant/Close Case Notify Complainant/Close Case	CE00009 CE00114	Not to be Used
Soft Letter (Warning Notice)	CE00098	Generate Letter/Record Delivery Generate Letter/Record Delivery Generate Letter/Record Delivery	CE00013 CE00028 CE00042	Not to be Used
Summons Notice	CE00080	Generate Summons/Record Delivery	CE00017	Not to be Used
Unfit Notice-Condemn Repair	CE00066	Generate Unfit Notice/Record Delivery	CE00029	Not to be Used
New Code Case from Portal (Email)	E003	When new case is submitted on Portal (DomainEntityCreate rule)		Not to be Used
Case Summary Report (RTF)	CE06	Not used in OOTB workflows		Not to be Used
Notice of Hearing CE (RTF)	CE08	Not used in OOTB workflows		Not to be Used
Notice of Hearing Results CE (RTF)	CE09	Not used in OOTB workflows		Not to be Used
Nothing out of the box		Generate Citation/Record Delivery Generate 2nd Citation/Record Delivery	CE00030 CE00032	Not to be Used
Nothing out of the box		Generate SWO/Record Delivery	CE00011	Not to be Used
Nothing out of the box		Appeal Notice	CE00053	Not to be Used
Graffiti Letter				In Scope
Zoning – 1 st Citation				In Scope
Zoning – 2 nd Citation				In Scope

Zoning – 3 rd Citation				In Scope
Zoning – Courtesy Letter				In Scope
Zoning – NOV				In Scope
Public Health Nuisance – Chronic Violation Letter				In Scope
Public Health Nuisance – NOV				In Scope
*MHF–City Council Meeting Notice				In Scope
*MHF–Courtesy Letter				In Scope
*MHF – Finding of Fact – Deteriorated-Fit				Not In Scope
*MHF – Finding of Fact – Deteriorated-UnFit				Not In Scope
*MHF – Finding of Fact – Dilapidated				Not In Scope
*MHF – 1 st Notice				Not In Scope
*MHF –2 nd Notice				Not In Scope
*MHF –3 rd Notice				Not In Scope
*MHF-Notice of Violation				Not In Scope
*MHF-Notice of Publication Complaint and Hearing				Not In Scope
*MHF-Staff Report				Not In Scope
TOTAL IN SCOPE LETTERS:				10

8.4 Reports

CityView out of the box reports are provided for Code Enforcement. No additional reports are included. Additional reports will require a Change Order.

Case Status	Case Follow-up	Case Summary
Incident History	Case Locator	Inspection To Do
Inspection Schedule	Deposits and Bonds Summary	Escrow (By revenue Account #)
Officer Activity by Inspection	Officer Activity by Case	Compliance Report

8.5 Alerts

There is one out-of-the-box Code Enforcement alert that is configured for this system. The alert behaves as follows: when a Code case is opened on a property, a moderate level alert will automatically be placed on the property. If a violation is flagged as dangerous and added to the Code case, the level of the property alert will automatically be increased to high. Once the Code case is closed, the alert will automatically be resolved and closed.

8.6 Out-of-Scope Activities

Minimum housing project workflow defined as per the requirement document *Minimum Housing Processes REV 28aug2019.doc*. There will be 3 separate workflows this Case Type (depending on the selection from the 3 values indicated below), there are very few activities that are common and, as per the documents, at some places the sequence of the activities also do not match, hence separate sub workflows are identified.

Custom field for this case type (attMinhousetype) with following values, will be created, and these will have to setup by an internal user:

- Order to Demolish (Dilapidated)
- Order to Repair (Deteriorated-Fit for Human Habitation)
- Order to Repair or Vacate (Deteriorated Unfit for Human Habitation)

Based on the above 3 options, the 4 separate workflows will be created

- Code – Minimum Housing – Main Process
- Code – Minimum Housing – order to Demolish
- Code – Minimum Housing – Order to Repair
- Code – Minimum Housing – Order to Repair or Vacate.

There are also 9 letters in the letter's section (10.3) which belong to Minimum housing process.

9 MODULE CONFIGURATION: CASHIERING

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

9.1 General Configuration

Configuration of CityView Cashiering using the information collected in the workbooks. This will include the following:

- 12360 Monroe - Cashiering Data Collection - FINAL.xls

9.2 Cashiering Settings

The City of Monroe has decided to use the following Cashiering settings:

- Batches will be created as one batch per day.
- New batches will be created when the cashier starts to process their first payment of the day.
- Penny rounding: Disabled
- Decentralized cashiering: payment will be taken by the same user who entered the application
- Users (cashiers) will manually close their batches when they start to reconcile their cash drawer.
- Credit Card needs to be an option in the Payment Method drop-down but there is no integration with a credit card/POS system other than Portal, so all credit card authentication will happen outside of CityView.
- Deposits are used to ensure landscaping and other work is completed; released at end of project.

9.3 Letters

Configuration of 2 letter templates for Cashiering

Template Name	Code	Trigger/activity that adds letter	Code	In Scope / Not to be Used
Receipt of Payment	CA00090	When user clicks Tender Payment.		In Scope
Check Overage Form	CAOF	When payment amount exceeds transaction amount and an overage record (CAFee) needs to be created.		Not in Scope
Miscellaneous Billing Document (RTF)	MSD	Used by Miscellaneous Fees		In Scope
TOTAL IN SCOPE LETTERS:				2

9.4 Reports

CityView out of the box reports are provided for Cashiering. No additional reports are included. Additional reports will require a Change Order.

Payment Detail	Reversals
Payment Detail (By Cashier)	Fee Maintenance
Daily Cash Out (By Revenue Account Number)	General Cashiering Report
Daily Cash Out (By Payment Type)	Daily Cash Out (By Fee Type)
Daily Cash Out (By Payment Type) With Fee Types	Daily Cash Out for Cashier (By Payment Type)

9.5 Out-of-Scope

None.

10 MODULE CONFIGURATION: PROPERTY INFORMATION

Configuration, whether required or desired, is considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

10.1 General Configuration

Configuration of CityView Property Information using the information collected in the workbooks. This will include the following:

- CityView Property Information Workbook.xlsx

11 INTEGRATIONS AND CUSTOMIZATIONS

11.1 GIS/Mapping Integration

Requested via an email dated 13 September 2019 that if possible provide layers for the following:

- Floodplain
- Historic District
- Downtown

The publically exposed map service (server) is found here:

CityView will create two maps: one for use inside CityView Workspace (for staff use) and one for use in CityView Portal (public) and CityView Mobile (for inspector/field use). The Portal/Mobile map will be used over slower connections and on lighter weight equipment; therefore, it needs to have fewer, less complex layers and it must not require the user to do any manual manipulation of those layers to do their work.

[http://\[customer domain\]/arcgis/rest/services/Current_Parcel/MapServer](http://[customer domain]/arcgis/rest/services/Current_Parcel/MapServer)

11.2 Online Payment Gateway

The City of Monroe has chosen to integrate with InvoiceCloud for online (Portal) payments only.

Biller GUID: b9e7422c-25ac-48fc-bb98-0b07f0cbc446

Web Service Key: 0cc4f213-a8de-48fc-bb6c-adb6c050a930

Invoice Type ID: 43 Permits

11.3 Laserfiche (EDMS)

CityView's electronic document management framework allows all documents generated by, or attached to, CityView records to be pushed through to Laserfiche using the document management system's API. This is done in real-time, so the user does not need to do anything deliberate in order to ensure that your records are moved into Laserfiche. CityView is able to push metadata information into the document management system using upload document business rules. The only metadata field that must be set is the primary reference number for the module to which the document is attached (e.g. Permits & Inspections, Planning, Code Enforcement, etc.) This becomes the relational "key" so that CityView can retrieve all applicable documents out of the Laserfiche the next time a user positions on the permit/application/case in CityView.

Required fields to be set in Laserfiche	Field Name in Laserfiche	Comment
Type	Type	Type field from CECASE or PRPermit or PLApplication
Project #/ Application	Project Number (recommended)	Please avoid using special characters in the naming of the fields.
Parcel	Parcel	Parcel number on the application / case
Address	Address	Address on the Application / case
Description	Description	Code case / Permitting or planning application from description field CECASE:DetailedDescription, PRPermit:Description, and PLApplication:PAName
Date	Date	Date of Entry
Status	Status	Only for Code Enforcement (CECase:Status)

The Laserfiche integration is out of the box, therefore it does not need to be created as part of this project. The only aspects of this integration that are "in scope" for the project are to configure the pointers and security settings so that CityView can find the Laserfiche server and connect to it, the business rules to push business-critical meta data into the Laserfiche document template fields (as indicated above), and configuration of the meta data keys so that documents can be retrieved for each applicable module in the CityView system.

11.4 Portal Customizations

CityView will create the Portal custom style sheets to match the look and feel of the City of Monroe's website:

<https://www.monroenc.org/Departments/Planning-Development/Planning>

The Portal Home page will display the following icons with the associated hyperlinks:

- Property
- Planning
- Permits & Inspections (for the Building Department)
- Code Enforcement

The customization will reflect the City of Monroe's custom style sheets (CSS).

In the event that the City decides to change their main website look-and-feel in the future, it should be noted that CityView will need to update these CSS customizations. This will be done at a nominal cost, but advance notice of 90 days is appreciated, so that we can schedule our developer's time. CityView recommends a template page that has a header, footer, and left sidebar (i.e. we do not recommend right-hand sidebars because they constrain the width of the CityView content too much.)

CityView does NOT support iFrames.

11.5 LDAP

We will use the information below to connect CityView to LDAP for user authentication:

Setting	Description	Values
Administrator Account Name	Account name for an account that has permissions to read AD/LDAP accounts.	
Administrator Account Password	Password for the account set above.	
Enabled	The overriding setting for whether to use LDAP integration.	
Fully Qualified Domain Name	The name of the domain under which the accounts reside.	
Secure	When set to true, SSL/TLS will be used.	
Users Are Members Of	Group name (e.g. CN=CVGroup, OU=Groups, DC=CityName, DC=StateOrProvince, DC=ca/gov/com).	
User Container	LDAP user container (e.g. CN=CommonName, OU=OrganizationalUnit, DC=DomainComponent).	
Group Attribute Name	The name of the property containing the user groups (e.g. <i>memberOf</i> for AD or <i>groupMembership</i> for NDS)	
Type	AD for Active Directory or NDS for Novell Directory Services	
User Attribute Name	Property for the user's name (<i>sAMAccountName</i> for AD or <i>cn</i> for NDS)	
User Schema Attribute Name	Name of where the class is stored (<i>ObjectCategory</i> for AD or <i>ObjectClass</i> for NDS)	
User Schema Class Name	Name of the class (<i>user</i> for AD or <i>inetOrgPerson</i> for NDS)	

11.6 Customizations

None identified

12 SCHEDULED PROCESSES

No specific additional scheduled processes have been identified for any of the modules. The OOTB scheduled processes for System Maintenance are as follows:

- Clear Letter Body for Printed (X+ Days Printed)
- Remove Letters from Print Queue (X+ Days Old)
- Open/Close CityView Portal Cashiering Batches - ENABLED
- Complete Waiting Activities
- Address Book - Alternate Addresses- ENABLED
- Address Book - Alternate Addresses Yearly Maintenance- ENABLED
- Address Book - Alternate Phone Numbers- ENABLED
- Address Book - Alternate Phone Yearly Maintenance- ENABLED
- Overdue Activity Reminder

13 CITYVIEW MICROSOFT ADD-INS

The Microsoft Outlook Add-in and Word Add-in are both in scope for this project. Both require the users to have an up-to-date version of Microsoft Office installed on their workstation. CityView does not currently support Office 365 for the Word and Outlook Add-ins (including Click-to-Run installs of Office). Office 2013 or above is recommended. For more information on our supported technologies, please consult CityView Connect:

<http://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/supported-technologies/789-microsoft-office-integration>

14 MISCELLANEOUS

Signature bitmaps have been collected from the City of Monroe for Employees who will need to "sign" letters. Any letters that have a place for an employee signatures will use these image files.

Lookup Codes, Statuses, and reference number formatting, will be used as they come out of the box.

Change Order / Quotation

CHANGE ORDER DESCRIPTION			
Request Date	03/02/2020	Quote Number	CO20200014
Client/Project	Monroe, City of NC	Valid Until	04/16/2020
Requestor	David Hill	Created By	David Hill
Description of the Requested Services Budget Validation Change Order from Scope Document Summary Items - see attachment for details - Data Conversion additional Scope - Code Enforcement - Minimum Housing Project custom workflow - 250 Work Items for Permits & Inspections - 6 extra letters 12360 Monroe Budget Validation Work Definition			
Impact Assessment: Estimate impact to budget, work effort and schedule. 2-4 weeks added to project schedule for extra validation and refinement time.			
Total Cost Estimated	\$ 36,750.00	Planned Delivery Date	April 21, 2020
Payment Terms	100% Services invoiced on execution of change order, due net 30 days. Applicable taxes not included.		
APPROVALS			
	PRINT NAME	SIGNATURE	DATE
For Customer	Lisa StiWinter		4-6-2020
For CityView			

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12360 Monroe Budget Validation Work Definition

The change order is to update the original contract pricing to reflect customizations identified as out of scope during the data collection and scope document review process.

1. Letters:

A total of thirty-two (32) letters were included in the original SOW. After data collection, the actual letter count required is thirty-eight (38) apportioned as follows:

Application	SOW #	Actual #
Planning	10	15
Permits and Inspections	10	11
Code Enforcement	10	10
Cashiering	2	2

Total 6 letters over the contracted amount. This will requires additional budget.

In addition, there are 2 complex custom letters that were identified during data collection.

The details and additional cost for these latter 2 letters will be addressed in a separate Change Order after more discovery into the custom letters and review during validation to determine if the OOTB letters will suffice.

2. Work Items for Permitting and Inspections:

The project was sold under the assumption that 1 department was using CityView Permits & Inspections and there were no custom workflows needed. During Data Collection, it was identified that the City's Building Department issues some permit types that CityView would typically associate with other departments (engineering, public works). As a result, there are over 250 work items but the project budget is structured based on 80-100 work items. We assume that the training budget will be sufficient because the same group of users handles all the permit types; however, more configuration time will be needed (comparable to 3 departments), and correspondingly extra validation time will be required. Finally, with that many work items, there will be extra data conversion effort because we have to cross-walk the legacy values to the correct work items and write additional scripts accordingly.

3. Code Enforcement - Minimum Housing Project Workflow:

Minimum housing project workflow defined as per the requirement document Minimum Housing Processes REV 28aug2019.doc. There will be 3 separate workflows this Case Type (depending on the selection from the 3 values indicated below), there are very few activities that are common and as per the documents, at some places, the sequence of the activities also do not match, hence separate sub workflows are identified.

Custom field for this case type (attMinhousetype) with following values, will be created, and these will have to setup by an internal user:

Order to Demolish (Dilapidated)

Order to Repair (Deteriorated-Fit for Human Habitation)

Order to Repair or Vacate (Deteriorated Unfit for Human Habitation)

Based on the above 3 options, the 4 separate workflows will be created

Code – Minimum Housing – Main Process

Code – Minimum Housing – order to Demolish

Code – Minimum Housing – Order to Repair

Code – Minimum Housing – Order to Repair or Vacate.

There are also 9 letters which belong to the Minimum Housing Process which will also have to be configured.

4. Data Conversion:

Initial Tables provided and mapped turned out to be mismatched – new tables have been provided, but significant rework has been needed to remap everything now that additional work items have been identified. Data tables and schema did not turn out to match once mapping began; all mapping is being changed to accommodate changes in schema order of columns, which necessitated almost going back to the start. This will require additional effort to complete and validate.

Change Order / Quotation

CHANGE ORDER DESCRIPTION

Request Date	07/29/2020	Quote Number	CO20200043
Client/Project	Monroe, City of NC	Valid Until	09/14/2020
Requestor	Catherine Mullis	Created By	David Hill

Description of the Requested Services

Based on our discussion ,for changes to existing Workflow for applications such as Kiosk, Change of Use, Home Daycare and Care homes etc. the required process is:

1. Application Entry (Mark the related fees as Unpaid)
2. Verify Application a. Verbally check with Planning Department b. Fee becomes payable
3. Pay fees
4. Route for Reviews
5. After Reviews are approved, Generate Inspections
6. After inspections are completed, then generate the Permit
7. Process stops.

This change order represents the effort to create this new sub workflow.

Impact Assessment: Estimate impact to budget, work effort and schedule.

Added during Validation; should not impact the schedule if delivered prior to UAT starting in early September.

Total Cost Estimated	\$ 3,150.00	Planned Delivery Date	Sept 1, 2020
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Payment Terms	100% Services invoiced on execution of change order, due net 30 days. Applicable taxes not included.
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APPROVALS

PRINT NAME		SIGNATURE		DATE
DRAFT ONLY				

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**BUDGET AMENDMENT
BA-2020-29**

1. Amendment to provide additional funding for the permit center software.

General Fund:

Revenue:

Unassigned General Fund Balance	\$103,975
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Expense:

Public Safety	\$103,975
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Adopted this 3rd day of November, 2020.

Bobby G. Kilgore, Mayor

Attest:

Bridgette H. Robinson, City Clerk