



Proposal for the City of Placerville, CA

Camino Permitting and Licensing System

Summary of Solution

Camino is a web-based solution that improves the customer experience for permit and licensing processes. Camino software is provided through a SaaS (software as a service) model, meaning that all functionality is accessed through the internet on a subscription basis. For this proposal Camino is excited to offer the solutions outlined below.

Camino Guide Summary:

The Camino Guide is an informational resource that serves as a virtual 'pre-meeting' for anybody thinking about starting a building project. After first answering a series of questions, applicants will automatically receive a customized guide containing their timeline, fees, and process for successful project completion. The Guide will also integrate with existing GIS systems to let the applicant know whether their project is allowed in the selected zone. By making every applicant an expert, the Camino Guide reduces errors, frees up valuable staff resources, and flags any potential issues at the outset to ensure a faster process.

Features:

- An online portal where residents can create an account and view current and historical projects.
- An intelligent Guide that will ask applications a series of questions about their building project and informs them where it is allowed and whether a permit or license is required.
- If a permit or license is required, the Guide will generate a customized checklist of steps for the applicant to follow, complete with detailed instructions.
- The Guide will automatically check for zoning compliance and any other geographic factors.
- The agency will be able to track all Guides that are created.
- The agency will be able to configure and manage the Guide through an entirely self-service administrative panel.

Enhancements for Application Intake:

This solution adds functionality to the Camino Guide allowing it to accept digital applications, documents and fees. All features integrate seamlessly with the Camino Guide, taking the applicant from the research phase all the way through starting their project.

- Applicants will be able to upload files directly to a required step in the Camino Guide.
- Applicants will be able to fill out digital forms when required by a given step. The values collected from these forms can be exported for each Submission.
- Fees can be calculated and paid directly through the application. A processing fee of 3% is applied to all credit card transactions.
- Review staff will be able to send an application back for changes, or mark applications as approved, rejected, or closed.
- Applicants and review staff will be able to communicate directly through Camino with our integrated messaging feature.

Permit and Licensing System:

Camino will assist in configuring and running a hosted Permit/Licensing System for the agency. The agency has the following needs that will be addressed under this scope:

- A fully hosted, web-based system that is accessible to staff and applicants.
- A smart application portal that generates a set of requirements based on the details of the application.

- Application review and reporting.
- Fee Generation and online payment capabilities.
- Document upload and storage.
- Internal review and task management.
- Inspection management.

Agency staff with Administrator-level permissions will be able to do the following configuration within the Permitting System:

- Build any type of Guide option they wish.
- Configure an unlimited number of internal users. Staff will be able to add and remove users at any time.
- Upload PDF files to create digital forms with overlaid fields or signatures that need to be collected from applicants.
- Define fees that need to be collected from applicants. Fees can be defined by a formula that includes numeric variables.
- Require that certain documents need to be uploaded as part of an application process.
- Create a series of templates for common tasks such as inspections or internal reviews.
- Use a logic-driven rules engine to create the different application, review, and inspection processes based on information provided by the applicant. The rules can also be driven by GIS queries. Camino will integrate commission-provided GIS layers into the Permit System.
- Configure the different permit types to be issued. Each permit type can be set to expire after a period of time. A re-application workflow can be defined for each license type and will automatically begin during the expiration window.
- Customize instructions and helper text through a rich text editor.
- Connect the Permit System to a commission-managed Stripe account. Camino will assist in setting up a Stripe account for the commission to accept payments made through Camino. There will be no additional cost to the commission in setting up a Stripe account.
- Create customizable review workflows with custom statuses, transitions, and auto-transitions based on task completion.

All Agency staff will be able to do the following (from a desktop or iPad browser):

- View a table of all Submissions. Filter by date, status, application type, and applicant name and address.
- For each Submission:
 - Update the status (Needs Changes, In Review, Rejected, Approved).
 - View all tasks assigned to the applicant and to internal staff. View task status.
 - Add or remove tasks. Assign tasks to any user and specify a due date. Mark tasks as complete.
 - View all answers provided by the applicant and all GIS queries that were run against the Submission.
 - View, update, add and remove data fields that were collected during the application.
 - View all documents that were uploaded by the applicant and by other staff. View a date stamp on each document.
 - *Please note that the system will not include any electronic plan review capabilities but can build an integration to plan review system*
 - Upload new documents directly to the submission. If on an iPad, attach photographs.
 - Fill out internal forms and inspection checklists.
 - View all financial transactions and outstanding fees. Refund (partially or fully) fees that have been paid.
 - Issue a Record (Permit or License) to the Submission. View all Records that have been issued to the Submission.

- Send chat messages directly to the applicant through any task or application step.
- Log private, internal notes on any task or application step.
- View an Activity Feed showing all messages sent.
- View a map showing how the Submission address interacts with GIS and parcel attributes. Please note that the map will not show GIS layers aside from parcels.
- Log time spent working on the Submission for time-tracking purposes. View a history of all logged time by a user.
- Request changes on specific steps for the applicant to re-complete.
- Create a new Submission on behalf of an applicant and assign it to their account.
- View a table of all Records that have been issued. For each Record, view the expiration status (active, expiring soon, expired) and manually update the expiration date. Void or archive records.
- View a list of all tasks assigned to a user, or all tasks across the system. Sort and filter by status, assignment, due date.
- View all Submissions and Records on a map. Select a location to view all Submission and Records at that address.
- Receive email notifications when an applicant sends a chat message and when a task is assigned to a user. A notification is also sent when a task nears its due date.
- Export a CSV file of all Submissions.
- Export (through Stripe) a CSV file of all financial transactions with credit card data limited to the last four digits of the card number. The commission will not receive any other credit card or any other consumer financial information from Camino. No credit card or other consumer financial information will be stored by Camino on the Commission's premises or property (including commission-owned servers).

Applicants will be able to do the following:

- Create an account based on an email address. All progress is saved in real-time when logged in.
- View a list of any applications (in progress or submitted) that have been issued.
- Go through a guided application process that starts with a survey. The survey asks for the type of permit, the location, and additional details defined by the Commission. These factors then generate a list of required steps for the applicant to complete.
- Be automatically informed of any location-based restrictions at their address.
- View a checklist-style list of all tasks that have been completed and that are pending.
- Fill out digital forms and sign with a digital signature.
- Upload documents by dragging-and-dropping from their desktop.
- View auto-calculated fees and pay fees via credit card. A 3.0% transaction fee is applied to all credit card payments by Stripe. This fee is not held by Camino or kept by Camino.
- Send chat messages directly to the agency.
- Receive email notifications when a chat message is sent by the agency, when the application status is updated, and when a Record is issued.
- Camino will allow applicants to schedule inspections through a calendar interface. Calendar invites will be sent to the applicant and inspector.
- View any Records that have been issued to the Submission.
- Receive an email notification when a Record is nearing expiration. The applicant will be invited back to the system to complete any required re-application steps.

Additional Scope

- Data Conversion from Excel
- No integrations required at the present time

Implementation and Support Package (select one of the two options below)

Self-Service Implementation

For this project the customer will be configuring their own Camino implementation with guidance from the Camino team. Camino's software is designed to put the customer in control and agency staff will have *full* access to all system configuration options including:

- Project Type Editor
- Guide Step Editor
- Rule Builder
- GIS Rule Configuration
- Rich Text and Content Editing

The self-service implementation includes:

- 5 hours of training for agency staff.
- 1 hour per week of email, zoom or phone support for the first three months of the agreement.
- 1 hour per month of support after the first three months.
- Camino assistance with GIS layer import.
- Access to Camino knowledge base.

Camino-led Implementation

For this project Camino will be leading and performing system configuration work during the implementation. A Camino Implementation Manager will suggest the best service package based on the project scope (for details see Appendix B – Pricing). The service package will include:

- Everything covered under the Self-Service option above.
- A fixed number of hours that can be used in year one for system configuration, staff training and process mapping.
- Additional hours in future years to add system functionality, make changes to the existing configuration and train new staff.

At the start of the implementation Camino will create a project plan with milestones. If the number of service hours exceeds the selected package the customer can upgrade their package or purchase additional hours.

Customer Service

Service Level Agreement

Camino offers a web-based platform that is accessible from all major desktop web browsers. Camino currently works on browser versions that are still supported by their parent company. As of the date of this proposal, the list of supported browsers (on Windows, OSX, or Linux) is:

- Chrome
- Firefox
- Internet Explorer / Edge
- Safari

Camino guarantees 24/7 access with 99.9% uptime. Camino will occasionally bring the service down for scheduled maintenance and updates, but never during the hours of 8am-6pm, M – F.

In the event that Camino ceases operations during the term of this agreement, Camino will (upon request) provide the customer with a full export of all customer data within 30 days of the request.

Technical Support Services

Camino will assign a Customer Success Manager to assist with onboarding, training, and ongoing support. This representative will be the primary point of contact for all requests and issues.

In order to initiate a technical support ticket, the customer must email support@camino.ai, or their designated Account Manager or Implementation Manager. Requests made through other channels are not subject to this SLA.

Camino uses the following incident response levels:

- Level 1: Mission critical error that prevents users from accessing or using the system.
- Level 2: A critical feature is broken.
- Level 3: All other bugs or errors.

When an issue is reported, Camino will respond within 4 hours during the hours of 8am-9pm PST, M-F. The response will include a support ticket and estimated time to fix. Camino targets the following fix times:

- Level 1 incident: 24 hours.
- Level 2 incident: 48 hours.
- Level 3 incident: 5 days.

Training

Camino will provide one kick-off meeting at the beginning of the implementation and up to five hours of staff training. The customer can include whichever staff they choose in this training session. Camino Led implementations will include additional hours.

Camino will run a monthly, two-hour virtual training webinar that all customers can access for free. Training content will be determined by the needs of the participants.

CAMINO INC. SOFTWARE SERVICES AGREEMENT

| | <u>Organization Contact</u> | <u>Billing Contact (If Different)</u> |
|----------------|-----------------------------|---------------------------------------|
| Customer Name: | <input type="text"/> | <input type="text"/> |
| Contact Name: | <input type="text"/> | <input type="text"/> |
| Address: | <input type="text"/> | <input type="text"/> |
| Telephone: | <input type="text"/> | <input type="text"/> |
| Email: | <input type="text"/> | <input type="text"/> |

Effective Date: []

Scope of Agreement: As outlined in the above proposal.

Fees: Starting at the effective date, the customer will pay an annual fee as outlined in Appendix B for the services outlined in the Summary.

Welcome to Camino! Thanks for using our software. This Software Agreement ("Agreement") is entered between Camino, Inc., with its principal place of business at 2261 Market Street #4302 San Francisco, CA 94114 ("Camino"), and you, the entity identified above ("Customer"), as of the Effective Date. This Agreement includes and incorporates the Camino Terms and Conditions attached as Appendix A. By signing this Agreement, Customer acknowledges that it has reviewed, and agrees to be legally bound by, the Camino Terms and Conditions.

| | <u>Customer</u> | <u>Camino</u> |
|---------------|----------------------|----------------------|
| Signature: | <input type="text"/> | <input type="text"/> |
| Printed Name: | <input type="text"/> | Nate Levine |
| Title: | <input type="text"/> | CSO |
| Date: | <input type="text"/> | <input type="text"/> |

Appendix A

Camino Terms and Conditions

1. SOFTWARE SERVICES

1.1 Subject to the terms and conditions of these Camino Terms and Conditions (the "Agreement"), Camino will use commercially reasonable efforts to perform the software services (the "Software Services") identified in the applicable Software Agreement entered into by Camino and Customer ("Software Agreement").

1.2 Customer understands that Camino's performance depends on Customer timely providing Camino with relevant data, feedback and configuration assistance. Any dates or time periods relevant to Camino's Performance will be extended appropriately and equitably to reflect any delays caused by Customer's failure to timely deliver any such materials. Camino shall not be liable for any delays in performance under this Agreement resulting from Customer's failure to meet these obligations.

2. RESTRICTIONS AND RESPONSIBILITIES

2.1 This is a contract for access to the Software Services and Customer agrees not to, directly or indirectly: reverse engineer, decompile, disassemble, or otherwise attempt to discover the source code, object code, or underlying structure, ideas, or algorithms of the Software Services, documentation or data related to the Software Services, except to the extent such a restriction is limited by applicable law; modify, translate, or create derivative works based on the Software Services; or copy, rent, lease, distribute, assign, sell, or otherwise commercially exploit, transfer, or encumber rights to the Software Services; or remove any proprietary notices.

2.2 Customer will use the Software Services only in compliance with all applicable laws and regulations (including, but not limited to, any export restrictions).

2.3 Customer shall be responsible for obtaining and maintaining any equipment and other services needed to connect to, access or otherwise use the Software Services and Customer shall also be responsible for (a) ensuring that such equipment is compatible with the Software Services, (b) maintaining the security of such equipment, user accounts, passwords and files, and (c) for all uses of Customer user accounts with or without Customer's knowledge or consent.

3. OWNERSHIP. Camino retains all right, title, and interest in the Software Services and all intellectual property rights (including all past, present, and future rights associated with works of authorship, including exclusive exploitation rights, copyrights, and moral rights, trademark and trade name rights and similar rights, trade secret rights, patent rights, and any other proprietary rights in intellectual property of every kind and nature) therein.

3.1 Camino warrants that Camino is the owner of the Software Services and has the right to license it to third parties. Camino will defend, at its expense, any action brought against Customer based on a claim that the Software Services infringe upon a United States or Canadian patent, copyright, trade secret, or other proprietary right of a third party. Camino agrees to indemnify Customer and hold Customer harmless against damages and costs, including attorney's fees, finally awarded against Customer in such actions.

4. CONFIDENTIALITY. Each party (the "Receiving Party") agrees not to disclose (except as permitted herein) any Confidential Information of the other party (the "Disclosing Party") without the Disclosing Party's prior written consent. "Confidential Information" means all confidential business, technical, and financial information of the disclosing party that is marked as "Confidential" or an equivalent designation or that should reasonably be understood to be confidential given the nature of the information and/or the circumstances surrounding the disclosure (including the terms of the applicable Software Agreement). Camino's Confidential Information includes, without limitation, the software underlying the Software Services and all documentation relating to the Software Services. "Confidential Information" does not include "Public Data," which is data that the Customer has previously released or would be required to release according

to applicable federal, state, or local public records laws. The Receiving Party agrees: (i) to use and disclose the Confidential Information only in connection with this Agreement; and (ii) to protect such Confidential Information using the measures that Receiving Party employs with respect to its own Confidential Information of a similar nature, but in no event with less than reasonable care. Notwithstanding the foregoing, Confidential Information does not include information that: (i) has become publicly known through no breach by the receiving party; (ii) was rightfully received by the receiving party from a third party without restriction on use or disclosure; or (iii) is independently developed by the Receiving Party without access to such Confidential Information. Notwithstanding the above, the Receiving Party may disclose Confidential Information to the extent required by law or court order, provided that prior written notice of such required disclosure and an opportunity to oppose or limit disclosure is given to the Disclosing Party.

5. PAYMENT OF FEES. The fees for the Software Services ("Fees") are set forth in the applicable Software Agreement. Customer shall pay all Fees within thirty (30) days after the date of Camino's invoice (which Camino typically sends 45 days after the Effective Date).

6. TERM & TERMINATION

6.1 Subject to compliance with all terms and conditions, the first term of this Agreement shall be from the Effective Date and shall continue for a period of sixty (60) months. At the termination of the initial term, the Customer will have the option to renew this agreement for subsequent twelve (12) month terms. The customer will be billed on an annual basis for each twelve (12) month term, and either party may terminate this Agreement at the end of the applicable term, without penalty, with thirty (30) days prior written notice. If either party materially breaches any term of this Agreement and fails to cure such breach within thirty (30) days after notice by the non-breaching party (ten (10) days in the case of non-payment), the non-breaching party may terminate this Agreement immediately upon notice.

6.2 Upon termination, Customer will pay in full for all Software Services performed up to and including the effective date of termination. Upon any termination of this Agreement: (a) all Software Services provided to Customer hereunder shall immediately terminate; and (b) each party shall return to the other party or, at the other party's option, destroy all Confidential Information of the other party in its possession.

6.3 All sections of this Agreement which by their nature should survive termination will survive termination, including, without limitation, accrued rights to payment, confidentiality obligations, warranty disclaimers, and limitations of liability.

7. WARRANTY AND DISCLAIMER

7.1 Camino represents and warrants that: (i) it has all right and authority necessary to enter into and perform this Agreement; and (ii) the Software Services shall be performed in a professional and workmanlike manner in accordance with generally prevailing industry standards.

7.2 Customer represents and warrants that (i) it has all right and authority necessary to enter into and perform this Agreement; (ii) it owns all right, title, and interest in and to all data provided to Camino for use in and in connection with this Agreement, or possesses the necessary authorization thereto; and (iii) Camino's use of such materials in connection with the Software Services" will not violate the rights of any third party.

7.3 CAMINO DOES NOT WARRANT THAT THE SOFTWARE SERVICES WILL BE UNINTERRUPTED OR ERROR FREE; NOR DOES IT MAKE ANY WARRANTY AS TO THE RESULTS THAT MAY BE OBTAINED FROM USE OF THE SOFTWARE SERVICES. EXCEPT AS SET FORTH IN THIS SECTION 8, THE SOFTWARE SERVICES ARE PROVIDED "AS IS" AND CAMINO DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY, TITLE, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT.

8. LIMITATION OF LIABILITY. NEITHER PARTY, NOR ITS SUPPLIERS, OFFICERS, AFFILIATES, REPRESENTATIVES, CONTRACTORS AND EMPLOYEES, SHALL BE RESPONSIBLE OR LIABLE WITH RESPECT TO ANY SUBJECT MATTER OF THIS

AGREEMENT OR RELATED TERMS AND CONDITIONS UNDER ANY CONTRACT, NEGLIGENCE, STRICT LIABILITY, OR OTHER THEORY: (A) FOR ERROR OR INTERRUPTION OF USE OR FOR LOSS OR INACCURACY OF DATA OR COST OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES OR LOSS OF BUSINESS; (B) FOR ANY INDIRECT, EXEMPLARY, PUNITIVE, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES; OR (C) FOR ANY MATTER BEYOND SUCH PARTY'S REASONABLE CONTROL, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

9. MISCELLANEOUS. Capitalized terms not otherwise defined in these Terms and Conditions have the meaning set forth in the applicable Software Agreement. Neither party shall be held responsible or liable for any losses arising out of any delay or failure in performance of any part of this Agreement, other than payment obligations, due to any act of god, act of governmental authority, or due to war, riot, labor difficulty, failure of performance by any third-party service, utilities, or equipment provider, or any other cause beyond the reasonable control of the party delayed or prevented from performing. With the Customer's approval, Camino shall have the right to use and display Customer's logos and trade names for marketing and promotional purposes in connection with Camino's website and marketing materials, subject to Customer's trademark usage guidelines (as provided to Camino). If any provision of this Agreement is found to be unenforceable or invalid, that provision will be limited or eliminated to the minimum extent necessary so that this Agreement will otherwise remain in full force and effect and enforceable. This Agreement is not assignable or transferable by either party without the other party's prior written consent, provided however that either party may assign this Agreement to a successor to all or substantially all of its business or assets. This Agreement (including the Software Agreement) is the complete and exclusive statement of the mutual understanding of the parties and supersedes and cancels all previous written and oral agreements, communications, and other understandings relating to the subject matter of this Agreement, and that all waivers and modifications must be in a writing signed by both parties. No agency, partnership, joint venture, or employment is created as a result of this Agreement and neither party has any authority of any kind to bind the other party in any respect. In any action or proceeding to enforce rights under this Agreement, the prevailing party will be entitled to recover costs and attorneys' fees. All notices under this Agreement will be in writing and will be deemed to have been duly given when received, if personally delivered; when receipt is electronically confirmed, if transmitted by facsimile or e-mail; the day after it is sent, if sent for next day delivery by recognized overnight delivery service; and upon receipt, if sent by certified or registered mail, return receipt requested. This Agreement shall be governed by the laws of California without regard to its conflict of laws provisions. Jurisdiction of any litigation arising from the Agreement will be in San Mateo County.

10. INSURANCE. Camino shall maintain for the duration of this Agreement the following insurance:

10.1 Commercial General Liability including coverage for premises, products -and completed operations, independent contractors/vendors, personal injury and contractual obligations with combined single limits of coverage of at least \$1,000,000 per occurrence.

10.2 Automobile Liability, including owned, non-owned and hired vehicles, with at least the following limits of liability: (1) Primary Bodily Injury with limits of at least \$500,000 per person, \$1,000,000 per occurrence; and (2) Primary Property Damage of at least \$250,000 per occurrence; or (3) Combined single limits of \$1,000,000 per occurrence.

10.3 Workers Compensation on a state-approved policy form providing statutory benefits as required by law with employer's liability limits no less than \$1,000,000 per accident or disease.

Appendix B

Fees

| Item | Includes | Cost |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| Camino Permit and Licensing System | <ul style="list-style-type: none">• Unlimited external users• Includes unlimited submission types• Features outlined in proposal | \$19,900 / year - standard 5-year contract |
| Camino Guide (information only) | <ul style="list-style-type: none">• Unlimited external users• Includes unlimited submission types• Features outlined in proposal | \$0, Included with Permitting System |
| Application Intake | <ul style="list-style-type: none">• Adds digital form and data collection functionality• Adds document upload• Adds fee processing | \$0, Included with Permitting System |
| Camino-led Implementation and Annual Service Plan | <ul style="list-style-type: none">• Includes 100 hours in Year 1 for implementation• Includes 25 hours of Camino-led service per year in subsequent years. This can be used for added build-out, end user training, etc. | \$15,000, one time charge |
| Data Conversion | <ul style="list-style-type: none">• 17-20k records from stated Excel files | \$10,000, one time charge |