

PATRIOT PROPERTIES



COMPUTER ASSISTED MASS APPRAISAL (CAMA) SOLUTION RFP# 15-29-2447SR

Prepared for: Hanover County, Virginia
Tax Assessor/Purchasing Division
Attn: Steven Rusch
Purchasing Division Director
P.O. Box 470/7496 County Complex Road
Hanover, VA 23069-0470



Prepared by: James McCathern, CEO
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LETTER OF INTEREST

Hanover County, Virginia
Tax Assessor/Purchasing Division
Attn: Steven Rusch
Purchasing Division Director
P.O. Box 470/7496 County Complex Road
Hanover, VA 23069-0470

Subject: Patriot Proposal to Provide a Computer Aided Mass Appraisal “CAMA” System

Mr. Steven Rusch and Selection Team Members:

Hanover County is seeking to leverage technology in order to improve the efficiency and effectiveness of the County Assessor’s office to support critical Real Property data accurately, efficiently and equitably. Patriot Properties is pleased to respond to your proposal with our unified Property Revenue Optimization CAMA system, AssessPRO AP5; a proven solution that will meet and exceed your expectations for many years to come.

Patriot Properties has extensive experience throughout Virginia. Our close partnership with our Virginia clients has given Patriot an intimate knowledge of the State’s assessment practices and taxation laws. Our thorough local knowledge and our software’s capabilities allow us to manage even the most complex of Virginia’s statutes. These capabilities will ensure your team’s success for many years to come, as we are committed to staying current with legislative changes and modifying our software as needed to ensure customer compliance.

We feel confident that your entire staff will appreciate the many advantages of working with Patriot Properties. There are numerous factors, our software, our team, our extensive experience with Virginia clients similar in scope to your county and most importantly our focus on your needs. We believe these factors set us apart from other CAMA providers.

We understand and will meet or exceed the stated goals for this project including but not limited to:

- Maximizing the efficiency of the County Assessor’s Office staff.
- Increasing appraisal accuracy, uniformity, and analysis capability. Meeting “Best Practices” of the IAAO and all State of Virginia standards and requirements.
- Providing Industry leading geospatial integration with comprehensive analysis and CAMA-GIS editing, utilizing the latest ESRI Technology.
- Providing the utilities, flexibility and interfaces to accommodate the changes that are inherent with a County Assessor’s Office, and meets all stated project goals.
- Providing you, your taxpayers and taxing units the most efficient avenue to excellent service that is available in today’s CAMA market.

Commitment to Virginia and Hanover County

Patriot is fully committed to meeting both your near and long term goals for this project and our references throughout the State and region can attest to Patriot’s track record of being on time and on budget with high marks for ongoing client satisfaction.

As a partner with you, we pledge to continue to create the best, most user friendly and inherently stable platform for your users to carry out their work in a precise, defensible and straightforward manner.



We look forward to answering any questions you may have regarding our submittal and stand ready to support Hanover County now and throughout the future of our partnership with you.

Long Term Stability

Patriot Properties, Inc. is stable and vastly experienced, closing in on our third decade as an innovative software provider with the same managing partners from day one. We are a partner group who take a personal involvement in not only our business, but in YOUR SYSTEM.

Even as industry leaders, we operate very low to the ground and we work hard to get to know you and your business practices. Our hope is to use the depth of our experience gained by our many years working with Virginia clients to enable us to anticipate your needs. We hope to serve Hanover County for many years to come with what we believe is the very best CAMA software on the market.

Intelligent/Responsive Support

Our entire team is extremely proud of our well established track record managing and supporting well over 100,000 parcels right here in Virginia. Our close partnership with this large Virginia user group has given Patriot an extensive understanding of the State's assessment practices and taxation laws. Our software has been engineered to comply with the individual needs of a Virginia client. It is because of this large presence in Virginia that we make it a point to be up to date on proposed and actual legislative changes, allowing us to modify our software as they happen, keeping our partners in compliance.

Most of our project implementation and support staff have been with the firm for well over 10 years or more and they are also deeply familiar with Virginia legislative rules, regulations and business processes.

At least as important as the software – our extraordinarily knowledgeable support team is easy to reach and is trained to help Hanover County be successful in every way. We fully understand the technical requirements, business process improvements, in depth training and support needed for a successful implementation. Our staff has a complete comprehension of all compliance, legislative and administrative demands.

In closing, we have the resources, the tools and the technology to fully meet the needs of Hanover County, now and in the future. We stand ready to begin this project immediately and to provide guarantees for this project's success. We look forward to addressing every question or comment regarding our proposal and aim to provide the best CAMA solution for your staff, your administration and your citizens.

SINCERELY,

Jim McCathern, CEO
Executive Partner in Charge
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3.2 SPECIFIC PROPOSAL INSTRUCTIONS

SPECIFIC PROPOSAL INSTRUCTIONS: Proposals should be as thorough and detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

A. RFP COVER SHEET AND ALL ADDENDA ACKNOWLEDGMENTS

Return the RFP cover sheet and all addenda acknowledgments, if any, signed and filled out as required.

RESPONSE: Please find RFP cover sheet and all addenda acknowledgments included in the “Attachments” Section of this proposal.

B. COMPLETE AND RETURN ATTACHMENTS LISTED IN SECTION 8.

RESPONSE: Please find Attachments listed in section 8 of the RFP included in the “Attachments” Section of this proposal.

C. A WRITTEN NARRATIVE STATEMENT TO INCLUDE:

1. Design, capability, and functionality of the proposed application software

RESPONSE: Easy to read, easy to use and highly configurable to your specific business needs, AssessPRO AP5, Our proposed solution continues to be the (CAMA) system of choice for customers with as few as 1,000 parcels to other customers of either similar size to Hanover County, or those with over 375,000 – each equally satisfied with the product because it helps them do their job better, easier and with fewer resources required for day-to-day tasks. The proposed solution AssessPRO AP5 has been in development since 2008 and was first released in a beta environment in 2012. AssessPRO AP5 has been created from scratch by Patriot Properties and developed on a Microsoft .NET framework using a revolutionary design for managing real and personal property data that readily integrates with your billing and collections system, the county will have complete access to information that is streamlined, accurate and is even set up to work in both PAST and FUTURE years with ease.



Some of the largest differences include:

- Multi-year handling, work can be performed for future dates
- Simplified data entry, search and look up features and reporting for easy use.
- Data that is the same from year to year is not duplicated
- Reduced risk by eliminating multiple independent applications.
- Improved communications and auditing across departments and reduction of the need to import and export data.
- Consolidated databases for improved integrity and reliability
- Enable the land records and finance teams to work together in a streamlined and cohesive manner.
- Readily configurable to assist in streamlining your business processes
- Integrated Sketching and Geospatial tools that graphically extend the CAMA functions

Proven throughout Virginia for over 12 years and more than 30 occasions of successfully produced tax rolls, our software empowers your workforce by utilizing the very best in .Net architecture, the industry's most completely integrated GIS utility and an amazing sketch application, all designed to manage critical information seamlessly between groups – even across multiple historic and future years.

Patriot's PRO suite of tools includes those recognized by ESRI as one of the most innovative uses of Geospatial technology in the industry for unmatched visual geospatial data processing, enabling the county to truly utilize GIS and integrated enterprise data with efficiencies that are the best in the industry.

To take it a step further, SketchPRO is widely recognized as the premier sketch application for local government and municipalities and has become popular throughout North America due to the efficient approach to data entry and information management.

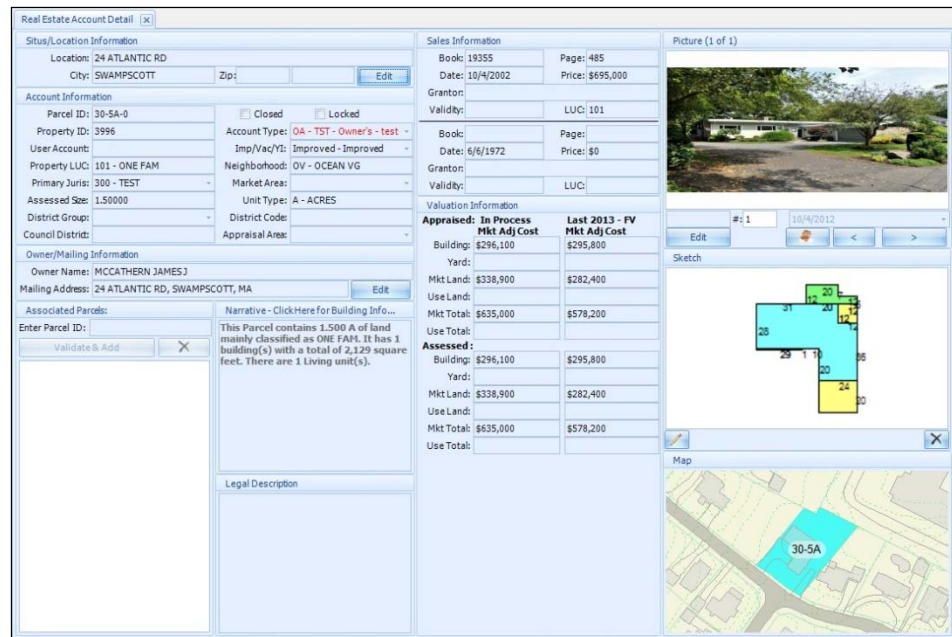
User Interface

Our user interface includes rich, full featured navigation that is readily configurable to streamline your business needs with tools available that are based on **more than 25 years of continuous improvements** in information workflow individualized for each client and optimized for revenue management from some as small as 3,000 parcels to others with over 350,000.

To date, evolution of the complete Patriot (PRO) system means that end users instinctively know where to find pertinent information quickly. Navigation between features is simplified greatly as our AP5 suite uses the newest .NET technology available to effectively manage screen form and function.

Real Estate Account Detail

This tab is displayed by default, as soon as the user logs into application. The workspace includes Account Information whose editable fields on this screen are a ‘Closed’ and ‘Locked’ check boxes that can be used to close and/or lock the account, Owner/ Mailing Information, Situs/Location Information,



Associated Properties which displays all of the Real Estate parcel numbers associated with selected account and a Narrative that is AUTOMATICALLY generated for viewing or reports.

Additionally, there is instant access to supporting information like the Legal Description, Account Status that displays the information about two, most recent, sales that has been previously entered by the user on the sales screen and valuation information that displays system calculated account values (full and assessed) for entered land, building, (Special Features/Yard Items) SFYI for the last and current year, as well as total value. It also displays special land credit and acreage data.

2. Describe the level of integration between modules.

RESPONSE: Sales Comparison Approach, Cost Approach and Income Approach are all tightly integrated, one can be chosen as final value or the approaches can be blended. Our system is fully integrated. When you edit a sketch, cost, income and comp sales are automatically updated. There is also an analysis module that calculates all relevant statistics built into the application.

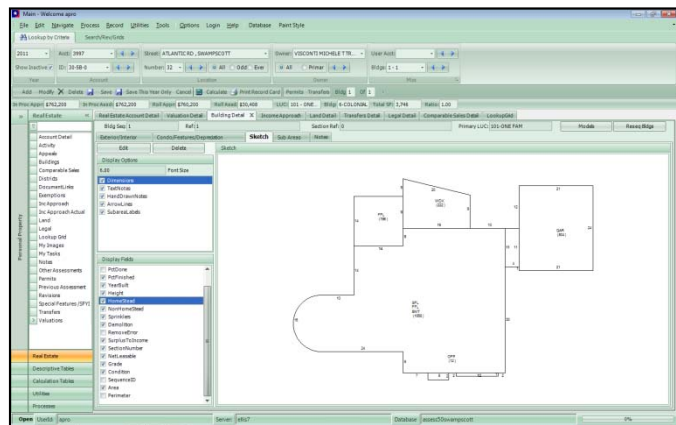


3. Describe any data integration services available.

RESPONSE: In addition to the extensive GIS integration and long standing business partnership we have with ESRI, we also work closely with a number of vendors that include Pictometry and others for additional streamlined access to information right at your fingertips. With so many of our experienced technical team versed in the typical needs of integration of systems that include FIS/B&C, Document Management, Permitting and much more, we are fully prepared to hit the ground running to create interfaces that are seamless and strong. A review of the project plan for AssessPRO AP5 shows that we have included in our proposal the time needed as well as all materials and appropriate manpower to work closely with all of your vendors towards the successful implementation of this system.

SketchPro

With one of the most advanced Patriot owned and developed sketch tools in the industry, Hanover County’s project will include a fully integrated sketch package that is unparalleled. A brief description follows, but to get a full appreciation of it, like so many of the advanced functions of our suite of tools our users love, we recommend a personal demonstration of this amazing product.



Patriot’s sketching toolset, SketchPro, is a highly functional **Graphic Data Entry** Toolset that can be run on a mobile device that provides a fully integrated relationship with CAMA, GIS, GPS, imagery and even voice recognition. All areas drawn **include all related assessing factors** which import automatically to the CAMA valuation approaches for calculation. There is no need to enter valuation information by hand. Assessment attributes are collected on the spot – accurately and quickly – and the data slips right into the CAMA system with **no conversion** needed!

MobilePro

Using (Optional) Mobile tools incorporated in your AssessPRO product suite allows for comprehensive field data collection using a mobile collection device that can be customized to your requirements, including controlling what the field personnel can view and/or edit.



Utilizing mobile data collectors increase both the efficiency of gathering data directly while in the field and prepopulating some pertinent CAMA data (including valuation), but also greatly improves data reliability, particularly when integrated with a camera and GPS (SketchPro can incorporate GPS points to correctly position and scale your sketches to the real world) as information is entered only once; eliminating redundancy in data entry.

Users can typically use either a tablet or a laptop PC, depending on your Information Technology team's requirements. These devices can be good dual solutions for full functionality both in the field and in the office for select personnel.

4. Describe GIS integration in detail. In Hanover County the GPIN and parcels are initiated in GIS and should flow from there to the CAMA system. Other information maintained in GIS should be available in CAMA via an interface or integration.

RESPONSE: Proper real-time synchronization is critical to a successful enterprise approach to GIS. Our system incorporates a combination of ESRI ArcObjects based application and holistic database functionality. The product manages edit events within ArcMap, recognizing when parcel records change, and creates transactional records in an underlying database transaction layer. The edits from the GIS can flow directly into a staging area where they will go through interim QC and processing before they will post automatically to AssessPro.

Geographic Data Analysis and Reporting is a high priority with Patriot Properties. Through this software, a wide variety of additional analysis and reporting capabilities are included. Thematic reports, maps and quick search tools are available to be fully customized to suit your needs.

Patriot Properties continues to develop the best solutions for our customers. As part of a fully integrated system that use the geospatial power of GIS, our suite of tools provides seamless integration that generates a host of proven benefits to our customers.

Unlike many other CAMA systems, GISPro is embedded in the CAMA product for a true integration between assessing functions and GIS functions. The GIS Viewer does not require any custom programming to set up and gives the user an easy way to link data to ArcGIS to and from AssessPro.

Patriot Properties provides truly ground breaking software that enables our clients to benefit from our continued commitment to provide a comprehensive solution for improving business processes, integration of systems and improved information management

Our industry leading GIS suite of tools was recognized by ESRI as one of the most tightly integrated in our industry and is built in a way that it does not require any custom programming from your GIS vendor. Practically right out-of-the-box, GIS Viewer gives the county an easy link to a host of geospatial analytical capabilities. As part of the implementation process Patriot will sync up the Parcel ID's from PRO with the correct polygons on your map layers to get you started.

This application's 'stand apart' functionality was internationally recognized by just four years ago through their **Partner of the Year** award and ESRI is an active partner in geospatial application development with Patriot, leading our industry in GIS integration with CAMA. The following information describes the levels of GIS integration that can be provided as a critical part of your AssessPRO AP5 integrated system.



This software works in ESRI ArcGIS **Versions 10.0, 10.1 and 10.2** and we have worked with them on effectively incorporating the National Land Record geodatabase model.

AssessPRO GIS VIEWER

This unique system is designed to fully integrate with all current CAMA and GIS data utilizing open ended architecture allowing not just viewing of related geospatial data, but actually utilizing a host of the functionality provided by ESRI tools to update the CAMA system by interfacing with the map.

Our solution offers the industry's most robust set of GIS features for every level of user. Patriot's GIS Viewer allows for total, seamless integration between CAMA and your enterprise mapping functions.

Patriot's geospatial tools are based on the industry leading ESRI product suite utilizing ArcGIS 10.0, 10.1 and 10.2, ArcObjects, ArcIMS, SDE, ArcServer using the Geodatabase feature architecture. Our land records solution also features modification to the existing geodatabase to facilitate seamless CAMA, GIS, and situs addressing functionality and data maintenance.

Full integration means **bi-directional data updates** from and to the CAMA using GIS as a visual interface. The AssessPRO GIS Viewer provides even more comprehensive set of tools for performing parcel map creation and map maintenance functions. This functionality is delivered as an extension to ESRI's ArcGIS 10.0, 10.1 and 10.2 offering several features that make it unique from the ESRI product ,one of those being; the user specific workflow.

5. Provide references from customers of a similar size to Hanover County who have installed the proposed solution.

RESPONSE: In addition to over 200 clients across the Nation in nearly 30 years of successful business, Patriot clients here have included Colonial Heights (2002) Fairfax (2008) Goochland County (2008), Roanoke County (2008) and Petersburg VA (2010) we encourage Hanover County to contact each of them as we are quite proud of our success and certain of our ability to provide you with the software and services you expect from a vendor you know you can trust.



Our references below include similar, successfully-completed projects in which our proposed team has been recently involved. We invite you to discuss all aspects of our performance with these customers and look forward to adding Hanover County, VA to our growing list of extremely satisfied clients

1. Customer/Client: Roanoke County, VA

Date of Services: 2008 to present Project size: 49,000 parcels,

Description of Services: AssessPRO (18 month implementation)

Contact Person: Billy Driver-Director of Real Estate Valuation

Address: P.O. Box 29800, Roanoke, VA 24018-0798

Telephone Number: (540) 772 - 2040

Fax : (540) 776-7129 Email: bdriver@roanokecountyva.gov

Summary of Project: Roanoke County is located in the western region of the Commonwealth of Virginia and with a countywide population of nearly 90,000.

By utilizing Patriot's AssessPro suite of tools since 2008, the county is actively and accurately managing data better, with more control and value than ever before.

The Assessor's staff has kept up with a continually expanding volume of information and requirements since that time without significant growth in resources due to the technical advantages Patriot's software provides.

The use of AssessPro and related modules along with the continuing expansion of development and customization has dramatically improved the way the Assessor's office does business.

Roanoke County, VA is quickly becoming one of Patriot's more advanced users and they have proven to be an active participant in the AssessPro community both regionally and from a national perspective.

Patriot Properties continues to work with Roanoke on many improvements to the CAMA system and related modules that are shared with AssessPro users across the county. Roanoke County uses MUNIS for their financial package.



2. Customer/Client: Saint Lucie County, FL

Date of Services: **Since 1998 to present** Project size: **190,000 parcels, \$1.7M budget**

Description of Services: **AssessPRO, (1.5 year Implementation)**

Contact Person: **Ken Pruitt, Property Appraiser, John Bausola IT Director, Vince Rahal, Director of Assessments**

Address: **1664 SE Walton Rd. Ste # 219, Port St. Lucie, FL 34952**

Telephone Number: **(772) 462-1051 (John Bausola)**

Fax: **(772) 462-1058** Email: **bausolaj@paslc.org**

Summary of Project: Saint Lucie County, Florida is located in Southeast Florida. With a countywide population of nearly 300,000, the Property Appraiser's staff has kept up with a continually expanding volume of information and requirements without significant growth in resources.

By utilizing Patriot's AssessPro application and suite of tools since 1998, the county is actively and accurately managing data better, with more control and value than ever before. The use of AssessPro and related modules along with the continuing expansion of integration of systems, application development and customization have dramatically improved the way the Assessor's office does business.



Saint Lucie County FL is one of Patriot's more advanced users and they have proven to be an active participant in the AssessPro community both regionally and from a national perspective. Patriot Properties continues to work with Saint Lucie on the upgrade to AssessPRO AP5 system and is scheduled to "go live" on May 1, 2014. The upgrade project is on schedule for that date.

3. Customer/Client: Berkeley County, SC

Date of Services: **From 2007 to present** Project size: **96,000 parcels**

Description of Services: **AssessPRO AP5 Upgrade 2013**

Contact Person: **Wilson Baggett**

Address: **1003 Highway 52 Moncks Corner, SC 29461**

Telephone Number: **(843) 719-4072**

Fax: **(843) 719-4271** Email: **wbaggett@berkeleycountysc.gov**

Summary of Project: Utilizing Patriot's AssessPro application and suite of tools since 2007. The County has a total area of 1,229 square miles of which 1,098 square miles is land and 130 square miles is water. The Assessor's Office manages approximately 83,000 parcels of real property and 13,000 manufactured homes from their offices in Moncks Corner SC and. Recently Berkeley County became one of our first customers to retire "Classic" AssessPro and utilize AP5 with its unique database architecture maintaining all years of assessment data and property characteristics in a single database. We are very proud of the Patriot and Berkeley County staffs commitment to this project in meeting the goals of an on time and on budget CAMA application upgrade. There was extensive project planning and a lot of hard work put in by both staffs to meet the project deadlines and we could not be more pleased with the success of this project. The Berkeley County Assessor's Office proved to be an ideal choice as an initial partner to implement AP5.



6. Describe installed base of customers specifically in Virginia and generally across the U.S.

RESPONSE: In addition to over 200 clients across the Nation in nearly 30 years of successful business, Patriot clients here have included Colonial Heights (2002) Fairfax (2008) Goochland County (2008), Roanoke County (2008) and Petersburg VA (2010) we encourage Hanover County to contact each of them as we are quite proud of our success and certain of our ability to provide you with the software and services you expect from a vendor you know you can trust. (**Virginia References and Full Client List Below**)

VIRGINIA REFERENCES

MUNICIPALITY	STATE	CONTACT	PHONE	YR.	PARCELS
<u>Colonial Heights</u>	VA	Kathy Holladay	(804) 520-9272	2002	8,000
<u>Fairfax</u>	VA	Dorrie Bennett	(703) 385-7844	2008	8,800
<u>Goochland County</u>	VA	Mary Ann Davis	(804) 556-5853	2008	15,500
<u>Petersburg</u>	VA	Richie McKeithen	(804) 733-2333	2010	14,000
<u>Roanoke County</u>	VA	Billy Driver	(540) 772-2035	2008	49,000

FULL CLIENT LIST

MUNICIPALITY	STATE	CONTACT	PHONE	YR.	PARCELS
<u>North Slope</u>	AK	Sid Kelly	(907) 852-0355	2000	7,200
<u>Hartford</u>	CT	Brian Penney	(203) 722-6157	1999	22,000
<u>Hebron</u>	CT	Debra Gernhardt	(860) 228-5971	2010	3,500
<u>Meriden</u>	CT	Mike Moradaski	(203) 630-4065	2009	19,500
<u>Brevard County</u>	FL	Jamie Burdett	(321) 264-6713	2014	325,000
<u>Broward County</u>	FL	William Barringer	(954) 357-7114	2012	750,000
<u>Dixie County</u>	FL	Ray Hodges	(352) 498-1210	2002	18,000
<u>Lee County</u>	FL	John Heaphy	(239) 339-6100	2004	500,000
<u>Orange County</u>	FL	Craig Sikes	(407) 836-5985	2001	480,000
<u>St Lucie</u>	FL	John Bausola	(561) 462-1016	1998	170,000
<u>Bartow County</u>	GA	Mike Floyd	(770) 387-5090	2006	35,000
<u>Pulaski County</u>	KY	Arlene Young	(606) 679-1311	2010	52,000
<u>Acushnet</u>	MA	Kelly Koska	(508) 998-0205	2001	5,000
<u>Agawam</u>	MA	Kevin Baldini	(413) 786-0400 x8704	1987	12,000
<u>Amesbury</u>	MA	Jason DiScipio	(978) 388-8102	2006	600
<u>Andover</u>	MA	David Billard	(978) 623-8270	1993	11,500
<u>Arlington</u>	MA	Bob Greeley	(781) 316-3051	2000	14,000
<u>Ashfield</u>	MA	Laura Arruda	(413) 628-4588	1988	1,600

<u>Bedford</u>	MA	Steve Poulos	(781) 275-0046	2009	6,000
<u>Belchertown</u>	MA	John G. Whelihan	(413) 323-0413	1999	6,500
<u>Bellingham</u>	MA	Betsy Cournoyer	(508) 966-5805	1999	6,500
<u>Berlin</u>	MA	Diane Peterson	(978) 838-2256	2007	200
<u>Beverly</u>	MA	Terry DeBlasie	(978) 921-6000 x2307	1999	12,800
<u>Billerica</u>	MA	Richard Scanlon	(978) 671-0971	1990	15,900
<u>Blandford</u>	MA	Brenda Marra	(413) 848-2791	2009	2,500
<u>Boston</u>	MA	Kevin Schell	(617) 635-1155	2011	30,000
<u>Boxborough</u>	MA	Ruth T. Anderson	(978) 263-1116 x109	2002	2,500
<u>Braintree</u>	MA	Bob Brinkman	(781) 794-8056	1990	13,500
<u>Brimfield</u>	MA	Cindy Poirier	(413) 478-5557	1989	2,500
<u>Brookline</u>	MA	Gary McCabe	(617) 730-2060	2003	15,700
<u>Buckland</u>	MA	Cherrie Smart	(413) 625-2335	1988	1,200
<u>Burlington</u>	MA	Jim Doherty	(781) 270-1653	1996	9,000
<u>Carlisle</u>	MA	Melissa Stamp	(978) 369-0392	1992	2,200
<u>Charlton</u>	MA	Deborah Ceccarini	(508) 248-2203	1988	6,000
<u>Cheshire</u>	MA	Gus Martin	(413) 743-3929	2005	1,600
<u>Cohasset</u>	MA	Mary Quill	(781) 383-4114	1999	3,500
<u>Colrain</u>	MA	Alice Wozniak	(413) 624-3356	2004	1,500
<u>Dalton</u>	MA	Fran Broderick	(413) 684-6105	1986	2,800
<u>Danvers</u>	MA	Marlene Locke	(978) 777-0001	1997	9,300
<u>Deerfield</u>	MA	Karen Menard	(413) 665-7184	1990	3,500
<u>Douglas</u>	MA	Beth MacKay	(508) 476-4000 x112	1999	4,500
<u>Dover</u>	MA	Karen MacTavish	(508) 785-0726	1996	3,000
<u>Dunstable</u>	MA	Victoria Tidman	(978) 649-3257	1994	1,400
<u>Erving</u>	MA	Jackie Boyden	(978) 544-2565	2002	900
<u>Essex MA</u>	MA	Richard Cairns	(978) 768-7831	2011	2,500
<u>Everett</u>	MA	Pam Davis	(617) 394-2209	2010	9,699
<u>Fairhaven</u>	MA	Jane Bettencourt	(508) 979-4018	2002	8,400
<u>Fall River</u>	MA	Ben Mello	(508) 324-2300	2004	27,000
<u>Falmouth</u>	MA	Trisha Favuilli	(508) 495-7377	2003	24,000
<u>Fitchburg</u>	MA	Tom Caputi	(978) 345-9563	1989	12,300
<u>Florida</u>	MA	Margo Van Peterson	(413) 664-6294	2004	800
<u>Franklin</u>	MA	Kevin Doyle	(508) 553-4879	2002	10,600
<u>Gill</u>	MA	Lynda Hodson Mayo	(413) 863-0138	2007	900
<u>Goshen</u>	MA	Cassandra Morey	(413) 268-7856	2005	1,100
<u>Greenfield</u>	MA	Audrey Murphy	(413) 772-1509	1993	7,300
<u>Groveland</u>	MA	Debbie Webster	(978) 372-8528	1997	2,400
<u>Hancock</u>	MA	Linda Burdick	(413) 738-5225	2011	1,000

<u>Hatfield</u>	MA	Jenni Williams	(413) 247-0322	2010	4,000
<u>Haverhill</u>	MA	Steve Gullo	(978) 374-2316	1990	20,000
<u>Heath</u>	MA	Val Kaempfer	(413) 337-4934	2009	2,000
<u>Holbrook</u>	MA	Gary Brennan	(781) 767-4315	2000	5,200
<u>Holyoke</u>	MA	Anthony Delude	(413) 322-5550	1995	10,500
<u>Hopedale</u>	MA	Teri Gonsalves	(508) 634-2203 x224	1997	2,600
<u>Hopkinton</u>	MA	Patti Howell	(508) 497-9720	1989	5,600
<u>Hull</u>	MA	Katherine Rebell	(781) 925-2205	2002	5,400
<u>Huntington</u>	MA	Al LaFrance	(413) 667-3501	1998	1,500
<u>Ipswich</u>	MA	Robin Nolan	(978) 356-6603	1995	6,000
<u>Lanesborough</u>	MA	Lisa Wellspeak	(413) 442-8622	1989	2,400
<u>Leicester</u>	MA	John Prescott	(508) 892-7061	1992	5,200
<u>Leverett</u>	MA	Donald Robinson	(413) 367-2039	1999	1,500
<u>Lincoln</u>	MA	Edward Morgan	(781) 259-2611	1994	2,800
<u>Littleton</u>	MA	Ken Mildren	(978) 952-2309	1994	3,900
<u>Lynn</u>	MA	Peter Caron	(781) 586-6702	1996	23,000
<u>Lynnfield</u>	MA	Dick Simmons	(781) 334-9450	1999	4,700
<u>Malden</u>	MA	Bob Donnelly	(781) 397-7100	1992	13,800
<u>Manchester</u>	MA	Ginny Noyes Thompson	(978) 526-2010	1998	2,500
<u>Marblehead</u>	MA	Mike Tumulty	(781) 631-0236	1988	9,100
<u>Marshfield</u>	MA	Libby Bates	(781) 834-5528	2005	11,500
<u>Maynard</u>	MA	Angie Marrama	(978) 897-1004	2008	3,500
<u>Medfield</u>	MA	Stan Bergeron	(508) 359-8505	2004	4,500
<u>Medway</u>	MA	Andrew Smyth	(508) 533-3203	2010	4,000
<u>Melrose</u>	MA	Chris Wilcock	(781) 665-2230	1996	9,100
<u>Merrimac</u>	MA	Ed Davis	(978) 346-9022	1992	2,400
<u>Methuen</u>	MA	Michele Mastrangelo	(978) 794-3219	1999	16,600
<u>Middleton</u>	MA	Brad Swanson	(978) 774-2099	1998	3,500
<u>Milford</u>	MA	Priscilla Hogan	(508) 634-2306	1992	10,000
<u>Millville</u>	MA	Susan McNamara	(508) 883-8433	1989	1,600
<u>Milton</u>	MA	Bob Bushway	(617) 898-4863	1994	8,500
<u>Montague</u>	MA	Barbara Miller	(413) 863-3200 X118	1989	5,000
<u>Monterey</u>	MA	Donald Clawson	(413) 528-1443 x115	1991	1,900
<u>Montgomery</u>	MA	Charles Darling	(413) 862-3386	1989	600
<u>Mount Washington</u>	MA	Carolyn Romano	(413) 528-2839	1992	500
<u>Nahant</u>	MA	Sheila Hambleton	(781) 581-0212	1993	1,400
<u>Natick</u>	MA	Jan Dangelo	(508) 647-6457	1998	12,949
<u>New Bedford</u>	MA	Rob Tetreault	(508) 991-6245	1996	28,000
<u>Newbury</u>	MA	Michelle Branciforte	(978) 465-0211	1995	3,700

<u>Newton</u>	MA	Elizabeth Dromey	(617) 796-1160	2003	1,300
<u>North Adams</u>	MA	Ross Vivori	(413) 662-3012	1989	5,800
<u>Northfield</u>	MA	Carol Holden	(413) 498-5586	1995	2,400
<u>Orange</u>	MA	Jay Closser	(978) 544-1108	2001	3,900
<u>Pembroke</u>	MA	Maureen O'Connor	(781) 293-2393	1997	6,951
<u>Pepperell</u>	MA	Susan Smith	(978) 433-0338	1990	4,000
<u>Plymouth</u>	MA	Anne Dunn	(508) 830-4020	1999	25,800
<u>Reading</u>	MA	Victor Santaniello	(781) 942-9027	2012	9,100
<u>Revere</u>	MA	Andy Iovanna	(781) 286-8170	2004	14,000
<u>Rowe</u>	MA	Bob Kenney	(413) 339-5520	1995	500
<u>Salem</u>	MA	Debbie Jackson	(978) 945-9595	2000	12,500
<u>Salisbury</u>	MA	Cheryl Gorniewicz	(978) 465-8242	1999	5,000
<u>Sandisfield</u>	MA	Noel Nilson	(413) 258-4701	1992	1,800
<u>Savoy</u>	MA	Julie Pavia	(413) 743-4290	1989	600
<u>Sherborn</u>	MA	Yvonne Remillard	(508) 651-7857	1993	2,300
<u>Shirley</u>	MA	Becky Boucher	(978) 425-2600 x220	1992	2,800
<u>Stoneham</u>	MA	Brian MacDonald	(781) 279-2640	1991	8,000
<u>Stoughton</u>	MA	Joe Gibbons	(781) 341-1300 x9229	1997	11,000
<u>Sudbury</u>	MA	Cynthia Gerry	(978) 639-3393	2001	6,500
<u>Sunderland</u>	MA	Maryann Kowaleck	(413) 665-1445	1987	1,700
<u>Swampscott</u>	MA	John Speidel	(781) 596-8858	1990	5,700
<u>Topsfield</u>	MA	Pauline Evans	(978) 887-1514	2012	300
<u>Townsend</u>	MA	Vicki Tidman	(978) 597-1760	1988	4,400
<u>Tyngsborough</u>	MA	Lauren Woekel	(978) 649-2300 ext. 122	1989	4,400
<u>Upton</u>	MA	Tracey Tardy	(508) 529-1002	2010	3,500
<u>Wakefield</u>	MA	Victor Santaniello	(781) 246-6300	1998	9,500
<u>Waltham</u>	MA	Joseph Goode	(781) 314-3200	1996	16,000
<u>Ware</u>	MA	Peter Harder	(413) 967-9610	1997	4,800
<u>Warren</u>	MA	Kathy Czub	(413) 436-5700	1995	4,000
<u>Watertown</u>	MA	Frank Golden	(781) 972-6410	1992	9,800
<u>West Bridgewater</u>	MA	Stephen McCarthy	(508) 894-1212	1999	3,400
<u>West Newbury</u>	MA	Meredith Stone	(978) 363-1101 x117	2002	1,700
<u>Westborough</u>	MA	Linda Swadel	(508) 366-3010	1991	5,800
<u>Westford</u>	MA	Paul Plouffe	(978) 692-5504	1999	8,800
<u>Whatley</u>	MA	Bruce Walker	(413) 665-3470	1987	1,300
<u>Whitman</u>	MA	Kathy Keefe	(781) 618-9762	1988	5,000
<u>Winchendon</u>	MA	Linda Bevan	(978) 297-0155	1994	5,200
<u>Winchester</u>	MA	Dan McGurl	(781) 721-7111	1990	8,200
<u>Worthington</u>	MA	Jean Boudreau	(413) 238-5578 x104	1996	1,200

<u>Auburn</u>	ME	Cheryl Dubois	(207) 786-2421	2002	10,000
<u>SO. Berwick</u>	ME	Joe Lessard	(207) 384-3300	2001	3,500
<u>Mills Township</u>	MI	Toni Brusich	(989) 573-8195	2012	5,678
<u>Presque Isle County</u>	MI	Sharyn Malone	(989) 734-3810	2010	10,000
<u>Jackson County</u>	MS	Nick Elmore	(228) 875-3367	2013	100,000
<u>Mecklenburg County</u>	NC	David Reeves	(704) 336-3069	2002	391,000
<u>Orange County</u>	NC	Hank Derby	(919) 245-2735	2009	60,000
<u>Brentwood</u>	NH	Jane Byrne	(603) 642-7013	1992	1,400
<u>Hudson</u>	NH	Jim Michaud	(603) 886-6009	2001	8,700
<u>Lebanon</u>	NH	Dave McMullen	(603) 448-1499	2010	7,000
<u>Londonderry</u>	NH	Karen Marchant	(603) 432-1120	1994	8,900
<u>Nashua</u>	NH	Angelo Marino	(603) 589-3042	2004	28,000
<u>Plymouth</u>	NH	Kathryn Lowe	(603) 536-1731	1996	2,600
<u>Rochester</u>	NH	Tom Mullin	(603) 332-5109	2001	10,400
<u>Somersworth</u>	NH	Bob Belmore	(603) 692-4262	1993	4,000
<u>Garfield County</u>	OK	Wade Patterson	(580) 237-0220	2013	35,000
<u>Cleveland County</u>	OK	David Tinsley	(405) 366-0230	2014	104,000
<u>Osage County</u>	OK	Gail Hedgecoth	(918) 287-3448	2013	42,000
<u>Payne County</u>	OK	James Cowan	(405) 747-8300	2013	33,000
<u>Pottawattomie County</u>	OK	Troyce King	(405) 275-4740	2014	46,000
<u>Barrington</u>	RI	Mike Minardi	(401) 247-1900	2011	6,700
<u>Central Falls</u>	RI	Matt Helfand	(401) 727-7430	2008	3,500
<u>Coventry</u>	RI	Patricia Picard	(401) 822-9132	2008	15,000
<u>East Greenwich</u>	RI	Wendy Shmidle	(401) 886-8601	2008	5,000
<u>North Providence</u>	RI	Janesse Muscatelli	(401) 232-0900 ext. 209	2008	14,000
<u>North Smithfield</u>	RI	Chris Belair	(401) 767-2200	2012	5,000
<u>Warren</u>	RI	Cathy Maisano	(401) 245-7342	2008	4,500
<u>West Warwick</u>	RI	Ray Beattie	(401) 822-9208	2010	7,500
<u>Berkeley County</u>	SC	Wilson Baggett	(843) 719-4072	2007	84,000
<u>Clarendon County</u>	SC	Bob Everett	(803) 435-4423	2005	35,000
<u>Fairfield County</u>	SC	Randy Roberts	(803) 712-6520	2007	22,000
<u>Georgetown County</u>	SC	Susan Edwards	(843) 545-3014	2005	63,500
<u>Kershaw County</u>	SC	Curt Arnold	(803) 425-1523	2007	45,000
<u>Lancaster County</u>	SC	Norman Anderson	(803) 285-6964	2005	64,900
<u>Newberry County</u>	SC	Mary Arrowood	(803) 321-2125 x1160	2004	30,000
<u>Spartanburg County</u>	SC	Earl Alexander	(864) 596-2548	2006	150,000
<u>Bradley County</u>	TN	Stanley Thompson	(423) 728-7125	2012	50,529
<u>Davidson County</u>	TN	George Rooker	(615) 862-6080	2001	235,000
<u>Hamilton County</u>	TN	Bill Bennett	(423) 209-7334	2010	150,000

<u>Monroe County</u>	TN	Mike Shadden	(423) 442-2106	2013	30,812
<u>Montgomery County</u>	TN	Erinne Hester	(931) 648-5720	2011	65,000
<u>Roane County</u>	TN	David Morgan	(865) 376-4362	2013	38,000
<u>Sumner County</u>	TN	AAS John C. Isbell	(615) 452-2412	2012	73,000
<u>Colonial Heights</u>	VA	Kathy Holladay	(804) 520-9272	2002	8,000
<u>Fairfax</u>	VA	Dorrie Bennett	(703) 385-7844	2008	8,800
<u>Goochland County</u>	VA	Mary Ann Davis	(804) 556-5853	2008	15,500
<u>Petersburg</u>	VA	Richie McKeithen	(804) 733-2333	2010	14,000
<u>Roanoke County</u>	VA	Billy Driver	(540) 772-2035	2008	49,000
<u>Barton</u>	VT	Randy Poginy	(802) 526-6222	2005	1,600
<u>Burke</u>	VT	Vicki Graves	(802) 467-3717	2006	1,145
<u>Burlington</u>	VT	John Vickery	(802) 865-7112	2003	11,000
<u>Castleton</u>	VT	Nancy Trudo	(802) 468-5394	2004	2,400
<u>Concord</u>	VT	Lorraine Rainey	(802) 695-2220	2006	1,030
<u>Derby</u>	VT	Tom Cyr	(802) 766-2012	2007	2,480
<u>Grafton</u>	VT	Kimberly Record	(802) 843-2426	2003	650
<u>Hardwick</u>	VT	Jean Hackett	(802) 472-6120	2005	1,484
<u>Jay</u>	VT	Fred Cushing	(802) 988-2996	2008	950
<u>Ludlow</u>	VT	Margot Martel	(802) 228-7206	2003	3,600
<u>Lyndon</u>	VT	Kelly Harris	(802) 626-5785	2003	2,200
<u>Montpelier</u>	VT	Steve Twombly	(802) 223-9505	2009	3,000
<u>Newfane</u>	VT	Doris Knechtel	(802) 365-7772	2002	1,400
<u>Norwich</u>	VT	Roberta Robinson	(802) 649-1419 x105	2011	3,000
<u>Proctor</u>	VT	Peter Ryma	(802) 459-2504	2002	700
<u>Rutland</u>	VT	Barry Keefe	(802) 773-1800	2004	6,200
<u>Salisbury</u>	VT	Kim Cunningham	(802) 352-4228	2004	800
<u>Troy</u>	VT	Bruce McKay	(802) 988-4785	2004	1,100
<u>Walden</u>	VT	Board of Listers	(802) 563-2220	2005	700
<u>West Rutland</u>	VT	Frances Flynn	(802) 438-2263	2008	1,000
<u>Westmore</u>	VT	Gail Brown	(802) 525-3235	2007	700
<u>Eau Claire</u>	WI	Al Andreo	(715) 839-4926	2003	22,000
<u>Racine</u>	WI	Bill Bowers	(262) 636-9119	1998	27,000
<u>Two Rivers</u>	WI	Shirley Shimulunas	(920) 793-5571	1998	5,500

7. Provide a statement of the offering company's financial stability, capacity and resources.

RESPONSE: Patriot Properties, Inc. has been in business since 1985. We operate as a Sub-Chapter S Corporation and have had the same basic ownership throughout our 29 year history. Patriot is proud to point out that The Company has been profitable for each and every year since 1987 and continues to see positive growth under the same ownership.

We maintain sales at our current level of between \$6,000,000 and \$8,000,000 and our expectation is for that trend to continue and include an ever growing user base of satisfied clients that use and support Patriot's suite of tools for many years. A significant portion of that investment is dedicated to the continuing improvements to our system, which can be seen in the ongoing development of AssessPRO, CollectPRO, GIS Viewer, SketchPro, among many others. We are proud of the fact that there are no past or pending litigation on any of our products or services.

Our corporate ideology has a firm commitment to controlled growth in our continued effort to bring each project in on time and on budget. Patriot is proud of the fact that each and every owner is accessible to address every question or concern that our client base might have.

If we are selected as a finalist, Patriot will be more than happy to provide any financial statements necessary to assure the selection committee that we are more than capable of providing the resources necessary to meet all of the agreed upon requirements to successfully complete this project.

Because of the confidential nature of these financial statements, we will provide Hanover County with a separate non-disclosure agreement with the release of our financials and other pertinent confidential information, which allows us to continue to realize a significant cost advantage over other competitors.

8. Describe professional staffing available for development, training, implementation, and support services.

RESPONSE: Project Organization and Staffing Experience

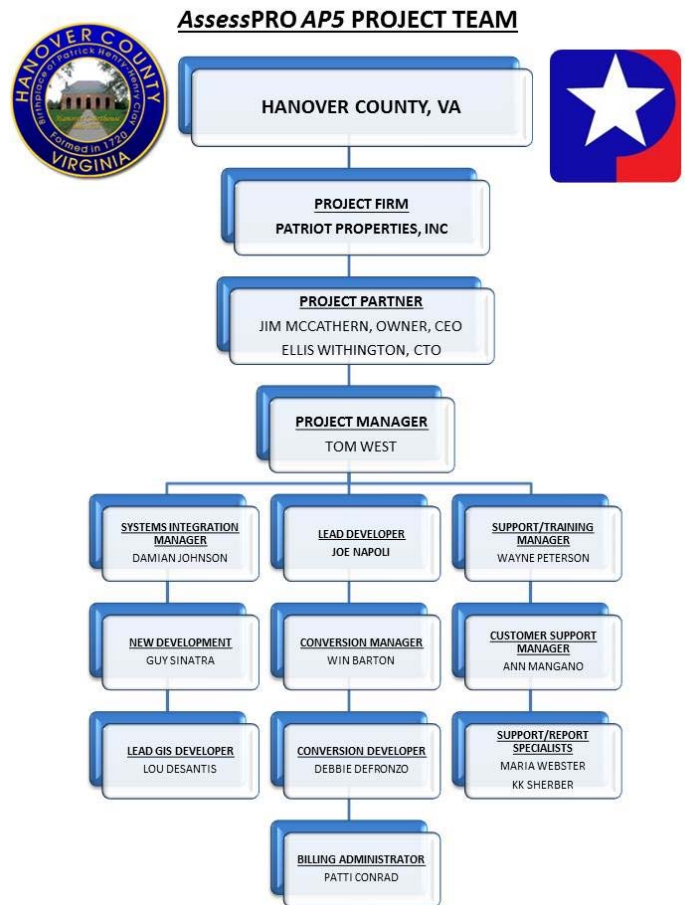
No one on our leadership team has less than a decade of experience working with advanced information management system development, deployment and support – and many on our leadership team have over 20 years in the industry, plus a large dedicated support staff noted below providing Hanover County proficient, professional and friendly people who are eager to support your team on this important project.

Total Number of Staff

- In the entire company - **60**
- In software development - **25**
- In product sales - **5**
- In technical support - **10**

Patriot, as your enterprise CAMA solution partner, can draw on a host of experts in specific technologies and third party systems from our resources around the US, giving Hanover County rapid access to a variety of nationally recognized experts in best management practices and technologies on demand.

For many years, we have been development partners with firms that include ESRI, Pictometry, Spatalest, SunGard, iLOOKABOUT, QPublic and others in order to bring the best and most useful technology to your team. We stay ahead of the curve by having our software ready for the latest version of these companies’ solutions before they are even available to the public.





Position / Title	Email	Telephone	Project Resource
Jim McCathern, CEO Project Executive	JamesM@patriotproperties.com	C (781) 820-6321	10 %
Ellis Withington, CTO Technical Architect	ellisw@patriotproperties.com	C (617) 548-6789	25 %
Tom West, AssessPRO Project Manager	tomw@patriotproperties.com	C (781) 929-0295	25 %
Damian Johnson, Release Manager/Support Lead	damian@patriotproperties.com	800-527-9991	25%
Joe Napoli, Developer Lead/Release Manager	jnapoli@patriotpeoperties.com	800-527-9991	10%
Wayne Peterson, Business Process Lead	waynep@patriotproperties.com	800-527-9991	25%
Debbie DeFronzo, Technical Analyst	debbied@patriotproperties.com	800-527-9991	20%
Ann Mangano, Training Lead	anng@patriotproperties.com	800-527-9991	20%
Patti Conrad, Billing Administrator	pattic@patriotproperties.com	800-527-9991	5%
Win Barton, Conversion Manager	BlueWaterSystems@triad.rr.com	336-643-4408	20%

Resumes

Patriot will provide detailed resumes for any project team members that Hanover County requires upon request. Following are a brief sample from our Leadership team.

JAMES J. MCCATHERN

CEO, Project Executive

Certified General Real Estate Appraiser

Commonwealth of Massachusetts, License # 87

Professional Experience

Patriot Properties, Inc. – 1985 – Present

Founding partner of Patriot and has been involved in the Tax Assessment industry since 1980. Served as Vice-President of Patriot from 1985 to 2001, and has served as the company’s Chief Executive Officer since 2004.

Holds a Massachusetts Certified General Appraisal License and has been a Project Manager and a Commercial and Industrial Valuation Analyst for hundreds of Tax Assessment Revaluation Programs since 1980. He also has considerable court experience as an expert witness for litigation involving Real Estate Valuation.

Serves as the managing partner that oversees the Patriot Fee Appraisal Department as well as Business Partner Relations and contacts.

Responsible for providing considerable input into the development of Patriot’s AssessPRO Software Applications particularly in the Income Approach Module and the GIS Viewer working with the Patriot CTO.

Assists the marketing department with product demonstrations, responses to requests for proposals, interviews and relationship manager.

Municipal Management Consultants, Inc. – 1980 – 1985

Performed Inspections of all types of property including commercial, industrial, and residential. Verification of property data including structural elements, mechanical systems, interior finish, etc. Commercial & Industrial Staff Appraiser. Performed commercial and industrial appraisals in numerous cities and towns in Massachusetts & Rhode Island. Involved in mass appraisal programs in over 30 cities and towns in New England.

Education

Carnegie Mellon University: Pittsburgh, Pennsylvania, 1975-1978

School of Architecture

Architectural Major

Appraisal Education

Massachusetts Board of Real Estate Appraisers

Appraisal Institute

International Association of Assessing Officers

JMB Real Estate Academy

Other:

Member of International Association of Assessing Officers

Subscribing Member of MAAO

Qualified as expert witness before:

- Mass. Appellate Tax Board
- Superior Court/Hampden County
- Superior Court/Essex County

Approved Project Supervisor, State of Vermont, Division of Property Valuation & Review

Faculty Member, Lorman Education Services & M.C.L.E. Property Tax Seminars

Seminar Instructor: (MAAO, Northeast Regional Association of Assessing Officers, Essex County Association of Assessing Officers, Worcester County Association of Assessing Officers)

President, The Phoenix School, Salem, MA (2005-2010)

President, Tedesco Country Club, Marblehead, MA (2010-2011)

Tom West

Project Manager

Technology consultant with extensive leadership experience with several of the nation's leading software and services providers.

Patriot Properties, Inc. 2009 – Present

Serving as Senior Project Manager for the firm, Tom has led the successful implementation of a number of Patriot projects. Tom planned and implemented Patriot's software-as-a-service (SaaS) solution. His responsibilities included cloud services vendor selection, system architecture, environment design, proof-of-concept, and the implementation of our first customer, Sumner TN.

Tom led the project to implement AssessPRO for Orange County NC. This project included a major effort to develop a replacement land records parcel management system, plus create four major system interfaces. Tom managed the client relationship, development team, conversion and implementation. The project was implemented within a year of contract signing, as scheduled.

SunGard Data Systems 1991 – 2007

Tom served in a variety of service and technology management roles for this leading provider of solutions for the financial services industry.

As a CEO, he managed a business unit providing trust tax software and services to 200 wealth management firms. In this role, Tom Improved service quality while successfully meeting demanding client delivery schedules. The company's improved business competitiveness and credibility resulted in acquisition tender from industry leader, Thomson Corporation.

As VP of Technology, Tom managed a development group providing portfolio management products for asset management firms. Under his leadership, the unit introduced numerous leading edge services including the first client access website and a real-time trade-routing network interface.

As a VP of Customer Services, Tom lead a national service supporting the management, clearance and settlement of bank treasury and investment portfolios whose customers included 75% of the top 100 banks. Managed data center, client support, professional services, QA, and data security units.

Tom dramatically improved client retention through major improvements in service delivery, focusing on zero-defect quality assurance and effective problem management. For a nationwide rollout of a new generation of front-end technology Tom restructured the implementation process to speed up client installations.

JP Morgan Chase 1979 - 1990

As VP of Production Services, Tom was responsible for data center operations, account management, help desk, QA, and implementations, and 24X7 operations of high-volume transaction systems processing up to \$20 billion/day. Tom established a service-management methodology emphasizing effective processes and accountable people.

As Director of Professional Services, Tom was responsible for account management, systems development, and support for an online cash management services organization. His leadership expanded the business 300% over three years, while expanding client base internationally. He also improved client satisfaction by establishing a track record of on-schedule project completion and successfully delivering over a dozen major projects.

Ellis Withington

Technical Architect

Patriot Properties, Inc. – 1985 – Present

President, (CTO as of 2005) of a real estate firm specializing in all aspects of real estate appraisal: property tax consulting, qualified expert testimony, investment analysis, and real estate appraisal software development.

Municipal Management Consultants, Inc. (M.M.C.) – 1979 – 1985

Revaluation project supervision, regional management and expert testimony, appraisal of all types of real estate. Had over 30 projects certified in Massachusetts, New Hampshire, and Rhode Island. Involved in modifications and development of Company Appraisal System. Supervisor-in-Chief of all value update projects, regional managers, project supervisors, and residential review appraisers.

Cole Layer Trumble Company – 1976 – 1979

Residential, commercial, industrial property inspection, and collection of data relating to structural details, field review, hearing officer, field supervisor, project supervisor, and appraisal of all types of real estate. Involved in approximately 15 projects in New Hampshire, Maine, Connecticut, and Massachusetts.

Damian Johnson

Developer/Support Lead

Patriot Properties, Inc. – 2007 – Present

Manage entire software development life-cycle from initial specification through post-delivery support. Oversee entire development and support staff consisting of 12 full-time employees in addition to outside contract vendors. Work with Chief Technology Officer to design architecture of new software backend and frontend for .NET rewrite of VB6 applications.

Patriot Properties, Inc. – 2003 – 2006

Manage data conversion of new clients, including cross-platform transformations, new assessing database creation and implementation, and upgrading to newer software versions. Provide advanced customer support and training for large national clients, that is, those jurisdictions with more than 100,000 parcels. Act as liaison to all six Florida clients, with more than one million parcels combined. Responsible for software compliance with Florida Department of Revenue regulations. Create and design new Transact-SQL stored procedures and alter database table structure for added functionality.

City of Brookline, Massachusetts – 2001 – 2003, 2004 – 2005

Managed property inspection program, including sales inspections, building permit review and cyclical reinspection of approximately 16,000 parcels. Compiled information for filing of annual tax rate recap forms. Helped create tax rate classification hearing presentation. Performed general office duties including customer service. Streamlined office procedures to save the town hundreds of worker-hours per year.

City of Salem, Massachusetts – 1998 - 2001

Managed sales, income and expense, 121A properties and TIF agreement files. Testified at Appellate Tax Board as representative from Assessing Department. Performed duties of assistant assessor in the field including sales analysis and building permit maintenance. Compiled all information for filing of annual tax rate recap forms. Maintained and analyzed computer assisted mass appraisal data for interim property revaluation. Performed general office duties including customer service.

Wayne Peterson

Business Process Lead

Patriot Properties, Inc. – 2003 – Present

Responsible for all valuation activities, progress, quality, and client satisfaction. Involved in large scale data conversions, valuation studies, software development, annual and triennial certifications and advanced end-user training.

Vision Appraisal Technology, Inc. – 1985 – 2003

Worked with support department, internal and external customers, development, government agencies, and management to analyze and understand user needs. Member of corporate strategy group to review and determine new direction. internal process for accurate data mapping and documentation for data conversion projects completed for new customers.

Key in leading \$1.4 million-dollar software development project for Sate of Montana. Selected from among 12 competitors. Served as a liaison between 8-person development team and customer to facilitate customized software design.

Expanded and trained the existing customer support department to improve response time and customer satisfaction. Integrated customer support and increased the department from two to six people. Created/managed Lotus Notes databases for call tracking and issues reporting for phone and Internet based access. Managed development of many in-house and Internet based training programs for customers.

1. Monitored all ongoing Municipal Projects, insuring the quality of the work product in order to meet or exceed Client, Company, and State requirements. General responsibilities included Review, Scheduling and Quality Maintenance of all Appraisal work, meeting Staff Requirements, Personnel Training and Client Interfacing. Performed appraisals in over 100 Communities throughout New England.

Win Barton

Conversion Manager

Blue Water Systems – 1990 - Present

Patriot Properties is pleased to continue our outstanding relationship with Mr. Win Barton of Blue Water systems. Mr. Barton has been engaged in every aspect of a wide range of CAMA projects, not only from the software and data-warehousing standpoint, but also direct involvement in the management of mass appraisal projects, including statewide reappraisals. A seasoned computer systems analyst and accomplished appraisal project manager with over 30 years of mass appraisal, CAMA systems implementation, and project leader experience.

In 1990, Win formed Blue Water Systems, which is based in the nearby Winston-Salem area of North Carolina. For years, Patriot Properties has seen Blue Water Systems provide unequalled expertise and customer service to its clients.

Since 1977, Mr. Barton has been engaged in every aspect of a wide range of CAMA projects, not only from the software and data-warehousing standpoint, but also direct involvement in the management of mass appraisal projects, including statewide reappraisals. His background in mathematics and computer science gives him an exceptional insight into understanding and analyzing the vast amount of data required in your system and Win's depth of knowledge of the Patriot PRO suite of tools makes him an efficient and exacting partner when meeting our time and budget commitments.

9. Provide pertinent items noted under Section 2 Statement of Needs.

2. STATEMENT OF NEEDS

2.1

The project scope for procurement and implementation of software solutions is briefly described below. Specific functionality within each category listed below is more thoroughly described in Attachment G (Functional Requirements).

RESPONSE: Please find Attachment G included in the “Attachments” Section of this proposal.

2.2 PROJECT TEAM STRUCTURE:

The Contractor shall include an estimate of the resource requirements that they will provide during this project. Hours should be presented in each of the project phases; Requirements and Design, Data Conversion, Testing, and Implementation. Any change of key personnel after contract approval must be reviewed and approved, in writing, by the County.

RESPONSE: Patriot Properties has a project based organizational structure. We have many employees who have worked for us for many years including our twelve plus years of providing products and services in Virginia. The organizational structure of the company has not changed much in the 29 year history of Patriot. Jim McCathern, our CEO and Ellis Withington our CTO will be key project participants and they are both founding partners of Patriot Properties. Our CEO Jim McCathern is a licensed, certified general real estate appraiser in Massachusetts and will be actively involved in the income modeling and GIS phases of the project. Having the ownership of the company directly involved in the project will result in rapid decisions and problem resolution when project issues arise. Mr. McCathern will be available directly via cell phone to the Hanover County Assessor and Project Manager. This direct communication link between Patriot Properties ownership and the County Assessor and Project Manager will lead to less frustration and less project risk for the County. Our project references and Virginia customers will attest to the significant roles that Mr. McCathern and Mr. Withington maintain throughout project implementation and the comfort level and benefits it provides to the jurisdiction.

2.3 PREFERRED PROJECT SCHEDULE:

After careful consideration of the County’s current technology situation, priorities for this project, and the County’s ability to absorb change, along with taking into consideration lessons learned from many other governments, the County has a preferred go-live schedule for the project prior to November of 2015. The assessment calendar restricts the ability of the County to go live between November and March.

RESPONSE: Patriot Properties is fully prepared to begin this project immediately. We understand that Hanover County has an ideal schedule which we are certain our team can comfortably accommodate and will be reflected in the final agreed upon project plan.

Hanover County’s **AssessPRO** implementation project can start on December 1, 2014 and we can confidently meet a Go Live date of September 1, 2015. This schedule assumes the AssessPRO CAMA software and third party integrations noted.

Prior to meeting with Hanover County for the initial project orientation meeting, our proposed project manager Mr. Tom West will work with r specified county project management resources to develop a project work plan. This will detail the proposed approach for the project and will include identifying resource requirements from all participants. This plan will contain a proposed schedule, work breakdown structure, description of tasks to be completed, and QA/QC processes that will be followed. A draft project plan will be provided for review at a staff orientation meeting, and will be updated throughout the project as procedures are modified and the schedule is updated.

Patriot team members will hold the orientation meeting with all significant stakeholders from the County. This meeting onsite will include a presentation of all the items agreed to in the staff orientation workshop, including an overview of the project, objectives, project tasks, and proposed schedule, and will include the following tasks:

Define team roles and communication protocols. The roles and responsibilities of Patriot’s implementation team members will be defined and communication protocols established.

Review/Update project plan. Patriot will present the draft project plan and will review it with County staff. Patriot will finalize the project plan based on the results of these discussions.

Determine County roles. Hanover County will review the assignments and roles of the staff members on this project.

IT, Business Process, System Configuration Review

One of the initial steps we take is to understand in detail the requirements that this project must incorporate. We will work closely with your IT department and software integration requests to ensure that all necessary preparations are taken to ensure that IT will be comfortable with handling the administration of the new system.

The Patriot team will begin the evaluation of your current database and business processes by reviewing relevant documents such as reports and forms. Our extensive knowledge of the Virginia CAMA business processes and State of Virginia D.O.R requirements will assist us in capturing significant issues quickly, minimizing your own staff time to be devoted to this phase. Of course, we will review and understand specific Hanover County requirements at this time as well.

Unwavering Corporate Commitment - We proudly stand by our products and our services. Validation of our commitment is the continued positive growth and level of client satisfaction we have experienced over the last thirty years. AssessPRO AP5 is now widely recognized as the new standard in intelligent automated mass appraisal, assessment, administrative and data management for local governments. Our three goals of reliability, accuracy and ease of use are skillfully blended within this signature CAMA software.

2.4 TRAINING:

The Contractor shall describe its training offerings and provide costs for implementation and ongoing support of their software solution. The training should include offerings for the following:

- A. Project implementation team (system architecture, interface configuration, data import/export, etc.);

RESPONSE: Patriot Properties shall develop and submit a comprehensive training plan and strategy suitable for training the County staff users to operate each of the new system components and provide ongoing support and maintenance. Training will include end user training, functional/system administration and database/technical training for the all related offices, including GIS, Appraisal Field Staff and the Information Technology Department.

Projects cannot be considered successful unless end users and administrators embrace the system by having a good comfort level early. In referring to the project schedule we provided, you will find that in addition to coaching users, Patriot includes formal training throughout a project in order to successfully have a level of knowledge transfer that is continually reinforced for all of the users of your new system. This process is one of the keys to our success for a high customer satisfaction early that we can then better maintain long term.

To provide continuing comprehensive knowledge transfer for the long term system ownership by the County, our team will work in a “**Train-the-Trainer**” approach throughout this process so your team will always have a resource internally that understands how to effectively teach new users or new skills to existing users. Training will take place during regular business hours at facilities provided by the County. Training will take place during regular business hours at facilities provided by the County.



- B. Application administrators (configure, monitor, and administer the system and reporting capabilities);

RESPONSE: Functional/Admin training provides key staff members identified as “Power Users” with the knowledge required to effectively operate the tools, analytical and otherwise, and provide system administration with the incorporated user friendly tools. The purpose of focusing on this level of training is to empower the power-users to make changes to the best practice templates, processes, and reference data set so that the jurisdiction is capable of making changes on their own. Technical training also teaches maintenance of the technical architecture required to provide long-term system support for advanced users and administrators.

Database/Technical Administration –Patriot looks forward to working closely with the County to determine the best fit for their IT training needs as they relate to the Patriot system. We are experts in the business of providing software as they relate to CAMA and integration with most of industry’s related third party systems and look forward to working collaboratively with your team to include the Hanover County IT group in our System Administration and Advanced training sessions that are designed to educate technical personnel on the enterprise database processes, backups and maintenance procedures that help our system run efficiently.

C. End users.

RESPONSE: End user training will constitute the bulk of the training scope. The courses are developed to address data maintenance, data access requirements, query requirements, and related requirements of County staff for both field and office personnel. Specific user training sessions will be held for each of the various functional areas/departments within the County as identified during the course of earlier phases.

A training plan should be provided that includes the number of training days required for each functional area broken down by the three tiers noted above, the estimated number of staff that will be trained in this time, and options for on-site and off-site training. The Contractor shall facilitate workshops with end users from various departments in the County demonstrating specific tasks and procedures they will use to interact with the proposed system solution. Offeror may propose a train-the-trainer approach for certain areas, but the County desires to use a collaborative training effort using vendor and County resources, so the training plan should be designed appropriately.

RESPONSE: We include an initial AP5 training Course (**Overview 1**) to show county staff what the software can do, using data from a Virginia County so they will learn with business processes and locations that are familiar to them. For this project, we anticipate using **Roanoke County** data for initial training and testing. This will allow users to start developing a comfort level with the system and new processes as we move forward with the project using data that has similar local requirements.

The next level of formal training (**Overview 2**) provides even more detail and is geared toward teaching County users how to better navigate through the system to find and review the **Hanover County** data received as part of the Conversion process for quality assurance and acceptance.

Advanced 1 training is even more in-depth, and includes more reporting and analytical process development to suit 'typical' business activities. From this point forward, we will primarily be using only your own data for training. The improved business processes have been incorporated and are now reviewed in more detail to begin to allow users and administrators to flex their new muscles with the more advanced technology. Also at this time, training on modules will be taking place at different times, which reinforce the understanding of information workflow and system navigation even further.

Finally, **Advanced 2** training is even more tailored to meet the specific needs of staff members who use the system to perform very distinct workflows and tasks and the entire team has opportunities to work through more 'real world' and 'what-if' scenarios using Hanover County data, workflows and protocols.

It deeply involves the County's dedicated personnel assigned for the Train-the-Trainer as that individual(s) will be required to provide some of the training with Patriot support as determined between parties prior to preparing the Go Live Training Agenda.

In addition to training the end users to comfortably and confidently use all aspects of the new system, it is important to reiterate that our team fully supports a train-the-trainer approach. We feel that we are **only** successful if our clients operate the system confidently and completely independent of us for routine tasks. This way, we pass along the ability for Hanover County to capably support itself and for end users to begin using the system with ease from day one.

Typically, an implementation of this type does not require additional training on Microsoft SQL Server or IT business processes. However, should the county determine an additional level of training is required beyond what is described above, we are prepared to work with your team to define specific training sessions aimed at educating your IT staff in adding users to SQL server, administer server roles as well as perform database backup functions as they relate to related modules' functions, and much more. Creating and migrating databases are normal support we have provided to higher level IT staff on a less frequent basis, as well.

Training is focused on achieving a comfort level that will provide County users with the knowledge they need to maintain the new system from the outset. Once achieved, Hanover County will then "Go Live" with the new AssessPRO system under the supervision of Patriot and County project management and technical staff.

Roll Out/Go Live

Upon acceptance of the testing results, Patriot will install an operational AssessPRO database on the County's production server, and County will install desktop software on to the computers selected by the County for the production-level deployment. Patriot will then assist in the migration of the data from the test server to the production server.

It is important to note - Training is performed throughout the project to provide as much exposure to the system as is feasible and often in a Train the Trainer format to allow the County to support themselves from within. This starts as users review the converted data, all the way through the testing and formal training process.

Patriot's unique method of educating our users along the way also allows our implementation team to streamline the configuration processes and make small beneficial changes on the fly based on end users discussions long before they go live with the software.

Once the County is live with the AssessPRO software, members of the Patriot team will be onsite for an agreed upon period of time to assist your end users, administrators and others as they work with day to day operations. Having been exposed to and actually use the product throughout the project, this level of support does not typically take long and can also be used to go over "what if" scenarios with users.

2.5 INTERFACES:

Offeror should evaluate the following list of required interfaces that are a part of the project. Costs and effort required to provide these interfaces as part of the project should be included in the proposal.

Required Interfaces: The Contractor shall be required to interface with the applications noted below. The Contractor shall detail how their software solution will integrate to these applications and describe the strategy and costs for interfacing with these applications. The County will establish a consistent data export format or interface from the System noted. The Contractor will work with the County on the file structure and format and will develop interface programs that integrate the data from the system noted into their software solution.

- A. **OWNERSHIP:** Parcel ownership is maintained by the Commissioner of Revenue in the Bright system. An interface is required to update and maintain the ownership within CAMA.

RESPONSE: Patriot Properties can meet this requirement

- B. **MAILING ADDRESS:** The mailing address is maintained by the Commissioner of Revenue in the Bright system. An interface is required to update and maintain the address within CAMA.

RESPONSE: Patriot Properties can meet this requirement

- C. **SITUS ADDRESS:** The situs address is maintained by the GIS department in an ArcGIS server environment. An interface or integration with GIS is required to update and maintain the address within CAMA.

RESPONSE: Patriot Properties can meet this requirement

- D. **ZONING:** Zoning information is maintained by the GIS department in an ArcGIS server environment. An interface or integration with GIS is required to update and maintain this information within CAMA.

RESPONSE: Patriot Properties can meet this requirement

- E. **SALES:** Sales are maintained by the Commissioner of Revenue within the Bright system. An interface is required to update and maintain this information within CAMA.

RESPONSE: Patriot Properties can meet this requirement

- F. **Additional information from GIS including deed book, page, acreage, legal description is maintained by the COR but stored in the GIS. An interface or integration with GIS is required to update and maintain this information within CAMA.**

RESPONSE: Patriot Properties can meet this requirement

- G. **GPIN:** Parcels are created in the GIS department when a plat is received from the planning department. The GPIN (Geographic Parcel Identification Number) is assigned by GIS at that time. The GPIN is currently the parcel identifier within the Assessor and Commissioner of Revenue. If the contractor's CAMA system does not have GIS integration please describe how an interface would work between GIS and the CAMA system. Ideally a "shell" parcel should be created in the CAMA system when a new parcel is created in GIS either as a new parcel, a split, or combination. A retired GPIN should trigger a workflow review. Please describe in detail how this interface or integration would work with your CAMA system, whether you currently have this functionality, and the cost to implement this as part of the proposal.

RESPONSE: Patriot's AssessPRO AP5 CAMA application tools includes those recognized by ESRI as one of the most innovative uses of Geospatial technology in the industry for unmatched visual data processing, enabling the counties to truly utilize GIS like nothing else.

Developed by award winning and nationally recognized geospatial technology firms, GISPro is built to enable your trained staff to use GIS to update the related CAMA data directly. The GISPro toolset includes a complete geospatial CAMA data update function that works in both directions. The ESRI functionality present in ArcEngine is used to render and highlight a group of parcels and tools enable the user to connect with any CAMA data field.

We have written stored procedures which applies the selected updated field to the corresponding field on the parcels rendered on the map layer. This saves a tremendous amount of time doing data entry and is dramatically more efficient and easier to use than a copy data function in other applications.

When the CAMA data is updated it can immediately be displayed by simply refreshing the map. We have similar functionality that will send a selected group of parcels directly to the CAMA application report engine and batch processing for calculation, valuation, method selection or printing.

2.6 IMPLEMENTATION SERVICES:

- A. **PRODUCT CONFIGURATION:** The Contractor shall describe the process for configuring the software solution, including multiple user environments, internal and external interfaces, telecommunication links, and security.

RESPONSE: Patriot Properties shall lead the installation of the software solution and any necessary third party software. Patriot shall be responsible for any and all integrations with third party software necessary for the application to run effectively as agreed to in the final contracted scope of work. Our team will work closely with County staff to assist in the development of required testing and staging environments. It is understood that the County will participate in this phase with the expectation of gaining the knowledge to create other instances of the software at the conclusion of this phase.

Patriot will install an operational AssessPro database on the County's production server, and County IT will install desktop software on to the computers selected by the County for the production-level deployment. Patriot will then assist in the migration of the data from the test server to the production server.

Patriot will install a baseline AssessPro database on the County's server and the County will install baseline desktop software on the computers selected for the development-level deployment. The baseline deployment will include full out-of-the-box software functionality, initially working with a generic dataset of similar size and scope as The County of Hanover that may include Roanoke County, for example.

- B. CONSULTING SERVICES:** The Contractor shall describe consulting service offerings and shall include titles and hourly billing rates of typical positions that provide this support, including third party providers.

RESPONSE: Patriot Properties’ implementation team is experienced in addressing change and developing contingency plans for moving forward with projects despite problems that are beyond our control. Municipalities often have resource constraints – and operational priorities – which can affect the course of a software system implementation. We understand and are willing – and more important, capable – of making changes to our project as required and getting the job done to your satisfaction.

- C. DATA CONVERSION SERVICES:** The Contractor shall describe any data conversion services provided. The Contractor shall be required to convert property and appraisal data for up to 6 years of data from the existing system. As part of the project, the Contractor shall develop a data conversion plan that documents the requirements and procedures for converting this data. The data conversion plan shall address conversion of all data typical for a CAMA data conversion and specifically property information, residential appraisal characteristics and values, notes, appeals, property override values, and property history. Commercial appraisal information is currently maintained in excel spreadsheets, Marshall & Swift, and Access databases. The effort for a conversion of this data should be provided as an optional service.

The Contractor should provide narrative on the balancing procedures used during data conversion and for assessment calculations going forward. As part of the implementation it is expected that the contractor will provide the calculations and supporting documents to enable the data from both systems (legacy and future) to be balanced to an acceptable level as defined in the acceptance test plan.

RESPONSE: Patriot Properties has worked with over 200 unique implementations of our software and will work with the County’s team to develop a database conversion plan to meet your requirements for this project. Through our vast experience, including prior Virginia experience converting systems similar to the existing database, we will work to map all of the data into the proposed solution. Through iterative process including at least three data passes we will refine the conversion scripts until we achieve acceptable results.

Included in our conversion:

- Calibration services that will include building AssessPRO AP5 calculation tables that will calculate values within 5% of the existing assessed values on 98% of the Taxable Parcels.
- Successful implementation of the proposed solution is the careful integration of other software applications in use by the COUNTY as well as accurate conversion of data to exactly match the requirements for your business needs
- Extra planning steps and care taken during the initial phases of an implementation will reap tremendous rewards when the system goes into a production mode.

The open standards design developed in the .Net framework of Patriot’s AssessPRO AP5 CAMA suite is the key to developing applications and allowing integration that will enhance the capability of the system and interface to other critical systems. The data structures can be used to build an interface to other databases and even create custom applications to access data. Patriot’s licensing policy does not prohibit this in any way because we believe “open systems” and “open standards” really means the system is *open*.

Flexibility and Responsiveness to Change

Patriot Properties' implementation team is experienced in addressing change and developing contingency plans for moving forward with projects despite encountering problems that are beyond our control. Virginia Property Appraiser's offices often have resource constraints – and operational priorities – which can affect the course of a new system implementation. We understand and are willing – and more importantly, highly capable – of adapting our project as required and getting the job done to your satisfaction.

Rapid Problem Resolution

Even on the most successful projects, problems can arise for any number of unforeseen reasons. Our team is highly experienced in collaborating with our clients to resolve problems. As we work through the project tasks and activities, we will continually assess risks, discuss potentially needed actions, and make mutually agreed upon changes to the project. We also make certain that those changes are well documented. This project diary is important in having a reference back to changes that are typical in any lengthy conversion and implementation.

2.7 PROJECT MANAGEMENT SERVICES:

The Contractor shall describe its project management services and those of key personnel. These services should include: resource management; project monitoring; configuration management; quality assurance; test planning; post-implementation support; and documentation. The Contractor shall provide a Project Manager for the project who should be prepared to draft and submit project plans and project status reports, and attend regular status meetings.

Hanover requires assurances as to the consistency and quality of vendor staffing for this project. The Contractor shall designate key personnel assigned to the project and shall provide resumes of these individuals. Resumes shall include typical qualifications, including relevant experience with similar projects. Hanover will work with the selected contractor to ensure the appropriate key personnel are assigned to the project. Once the team has been established, the County must be notified by the Contractor of any changes to key personnel after contract approval. The County shall have the right to request key personnel be removed from the project team and replaced with a substitute.

RESPONSE: Patriot's experienced implementation and development team understands and recognizes that the assessing operation and business functions of each client can be quite different from other locales, not just nationwide, but within the same state as well. We have a growing local user base in your state and can use the experience of previous implementations to ensure that your development will proceed smoothly.

Patriot Properties' Leadership Team has developed and refined an approach to the analysis and implementation of a project that has been proven successful in many varied venues over the last 30 years. Our goal is **ON TIME - AS PROMISED** delivery of software and services. Patriot Properties will use their extensive experience to assist you in improving your existing uses of technology, business processes, and supporting organizations. We know that your data is critical and our work will be to improve each aspect of working with that critical data.

2.8 HOSTED & SOFTWARE AS A SERVICE:

Offerors that are proposing a hosted or software as a service solution to meet the requirements of this RFP should consult Attachment E for more information. Attachment E includes a thorough list of opportunities and constraints that the County has identified as needing to be addressed when implementing hosted or SaaS solutions. Vendor responses for hosted and SaaS shall address the items included in Attachment E.

RESPONSE: Patriot Properties is not proposing a Hosted Solution

10. Provide all items noted under Section 5 Information Technology Terms and Conditions.

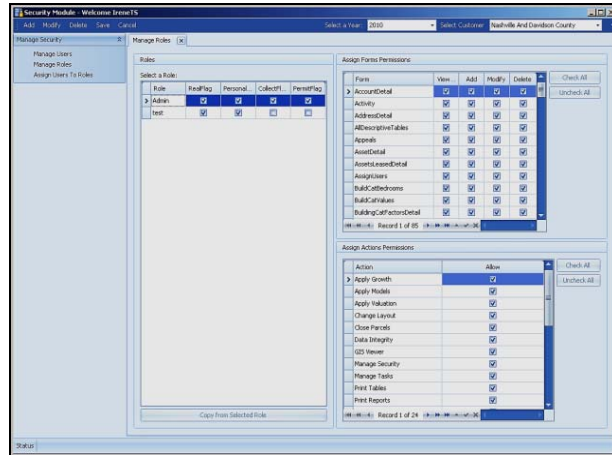
5. INFORMATION TECHNOLOGY TERMS AND CONDITIONS

5.1 SECURITY:

- A. REMOTE ACCESS:** The Contractor shall comply with the Hanover County Vendor Remote Access Procedures, and any amendments during the term of the contract. This document has been included as Attachment F.
- B. INFORMATION:** Information shall not be removed from Hanover County Government offices or computers unless the information's owner has approved such removal in advance. This includes, but is not limited to, portable computer hard disks, portable memory devices (including USB drives), floppy disks, CD-ROMs, magnetic tape cartridges, and paper documents.
- C. AUTHORIZED TOOLS AND PROGRAMS:** Except as authorized in writing by Information Technology, the Contractor shall not download, install or run security programs or utilities that reveal weaknesses in the security of a system. For example, Contractor shall not run password cracking programs, network reconnaissance/discovery software/applications, key loggers, packet sniffers, network mapping tools, port scanners or any other non-approved programs while connected in any manner to the Hanover County network infrastructure.
- D. PROTECTION OF CONFIDENTIAL DATA:** All data provided by the County to the Contractor shall be considered "Confidential" unless specifically noted to the contrary by the County. The Contractor shall take all steps necessary to ensure that any Confidential Data provided by the County to the Contractor in furtherance of the performance of this Contract are not disclosed to the public or to any organizations or individuals, unless the County first approves such disclosure in writing. The Contractor acknowledges its understanding that the laws of the Commonwealth of Virginia prohibit the release of Confidential Data to unauthorized individuals or organizations and that the Contractor may be liable under those laws for any Confidential Data that it releases to individuals or organizations without written authorization from the County. Therefore, the Contractor shall implement procedures to safeguard any Confidential Data provided by the County in support of this Contract to the Contractor or to any subcontractor thereof from access by individuals or entities other than its own employees or those of its subcontractors using the Confidential Data in the performance of this Contract. The Contractor shall instruct its employees and those of its subcontractors not to copy or duplicate in any manner other than as required for the normal course of business in the performance of this Contract, or make any disclosures with reference to, any Confidential Data provided by the County.

RESPONSE: AssessPRO AP5 enables managing roles to set permissions as well as set up a simplified User Interface by removing unnecessary buttons or ordering tools and actions in a way that streamlines the business processes for even greater effectiveness for your staff.

The detailed permissions information will display in the Assign Forms Permissions and Assign Actions Permissions grids. Permissions can be modified by checking or unchecking corresponding check boxes. You can also check or uncheck all permissions by clicking Check All/Uncheck All buttons.



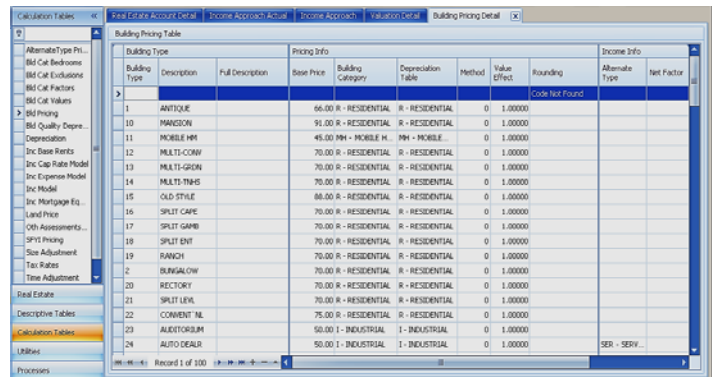
Add New Role – Click on the New Role button on toolbar. The new row will appear in the Roles field. You can manually enter the role description in this field or select an existing role by clicking on the Copy from Existing Role button. To do this, select the existing role with the permissions you want to copy and click on the Copy... button. The new row will display in the Roles field, and the Assign Forms Permissions and the Assign Actions Permissions grids will be populated with copied information. Then just enter the new role description into the new row in the Roles field and click Save. Deleting roles is just as easy – simply select an existing role and click Delete.

To assign a new user a role, click on a row in the Available Users field, then click on >> to assign this user to a selected role, the user name will display in the Assigned Users... field. To remove assigned user, select a row in the 'Users Assigned to Selected Role field and click on << button.

Audit Trail

In the *Action* column, there are only three codes to quickly provide useful information: "I", "U" and "D." The code "I" shows any data that has been inserted. The code "U" shows any data that has been updated. And the code "D" shows any data that has been deleted.

The Audit Trail also records the "before" and "after" characteristics of every change to every parcel.



Building Type	Description	Full Description	Base Price	Building Category	Depreciation Table	Method	Value Effect	Founding	Code Not Found	Alternate Type	Net Factor
1	ANTIQUE		66.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
10	MANSION		91.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
11	MOBILE MH		45.00	MH - MOBILE H.	MH - MOBILE...	0	1.00000				
12	MULTI-COM		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
13	MULTI-GROW		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
14	MULTI-STARS		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
15	OLD STYLE		68.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
16	SPLIT CAPE		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
17	SPLIT GAMB		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
18	SPLIT ENY		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
19	RANCH		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
2	RISING LOW		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
20	RECTORY		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
21	SPLIT LEVEL		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
22	CONVENT NL		75.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
23	ALEXTOURISM		50.00	I - INDUSTRIAL	I - INDUSTRIAL	0	1.00000				
24	AUTO DEALR		50.00	I - INDUSTRIAL	I - INDUSTRIAL	0	1.00000			SER - SERV...	

In addition to this quick utility, Patriot provides **total access to the revision audit trail**. The complete database audit records can be viewed in the Audit Trail section of the Advanced Utilities.

Patriot's PRO suite of CAMA tools is designed to enable our clients like Hanover County to track all manner of information in addition to edit audit trails to evaluate and improve upon internal operations.

5.2 OPERATING ENVIRONMENT:

- A. BACKGROUND:** Hanover County operates in a Windows based environment running on Intel architecture. Software solutions run in a 64-bit architecture virtual (HyperV) environment. The County uses open architecture and Open Database Compliant (ODBC) compatibility. The County runs Microsoft SQL Server as its database. The County runs its Enterprise Network on a switched Ethernet environment.
- B. HARDWARE AND SOFTWARE:** The Contractor shall describe the hardware and software platform and database required for the software solution, including any elevated user permissions required to run the software solution. The Contractor shall describe in detail bandwidth and transport requirements, any special firewall or NAT requirements, current level of IPv6 support or if not currently supported the timeline to implement IPv6.

RESPONSE:

Recommended server specs

- Windows Server 2008R2 or 2012
- SQL Server 2008R2 or 2012
- Intel Xeon 30ghz+x64
- 16-32 GB Memory
- 2x500 GB Hard –drives on a Raid 1 (OS Partition)
- 6x500 GB Hard-drives on a Raid 5 (Data Partition)
- Tape Backup Unit if Applicable

AssessPRO AP5 runs equally well on Windows XP, Windows 7 and Windows 8. Windows Server 2008 and Windows Server 2012 are both supported. SQL 2008 R2 and SQL 2012 are the latest versions we support.

Recommended workstation specs

- Windows 7 (or up) 64 bit
- Intel i3 1.8 GHz or better
- 2 GB available hard drive space for our application and reports (if buying new get at least 250 GB drive)
- 6GB RAM
- 1024 x 768 minimum monitor resolution (96dpi)
- 512 MB RAM video card to run GIS Viewer

- C. **MULTIPLE ENVIRONMENTS:** The Contractor shall describe its system architecture using written and graphic means, including if the software solution supports multiple environments, with the ability to run concurrently for development, testing, training, and production. The Contractor shall allow the County to have multiple instances of the software solution installed without incurring additional costs (development, test, training, and production).

RESPONSE: A hallmark of any system deployed by the Patriot team is thorough and strictly-adhered-to testing procedures. The Patriot team will work with County staff to ensure that a quality assurance environment has been established that meets the specific testing and operational needs of County users.

Test data will be verified and the Test/Training environment established. The production deployment will include full software functionality including configuration and customization, working with the County's datasets.

The Patriot team will work very closely with County staff early in this project to define the format and content of user acceptance and integration tests. We will coordinate documentation, execute and record the testing, analyze and update the system as required. These are critical systems and county resources will need to be dedicated to these tasks during this period of between two and three weeks.

User acceptance and integration testing will be conducted prior to deployment of the system in the production environment. The testing plan will include procedures to be followed should elements of the delivered system fail these tests.

The Test Strategy detailed below is an excerpt from our larger set of testing plans that are for both internal and external procedures. Information relevant to the Clay County PRO implementation below describes at a high level, the scope, approach, resources and schedule for the testing activities of the PRO applications. The Test Strategy document is maintained throughout the life of a project.

Patriot provides the team members responsible for testing our preformatted that details how testing will be managed for this project. The test effort is then planned, prioritized and executed based on the project priorities as defined in the Project Plan and Requirements Specification. This is a living document that is typically refined as the project progresses. The QA Manager, Product Manager, Project Manager, and Development Manager reviews and approves the final version of the Test Strategy document.

Unit Test - Unit testing is performed by developers to determine that individual program modules perform per the design specifications.

System Test - System testing is performed by the Test team. System testing will include many separate tests to ensure that the application will work as expected in the production. System testing includes stress testing, load testing, requirements validation, security testing, performance testing, etc.

With each build the Test Team will perform regression tests by executing manual tests after each successful build of the application, prior to release of the build for general testing use. This will include the re-testing of each item in each test script as well as the re-verification of each repaired defect that is identified.

Additional testing beyond the scripted test may be done when needed to exercise the application to verify error handling and system recovery due to incorrect data or entry into fields.

Integration Test - By this test the Test team will validate that the individually tested components and applications work correctly together as documented in the final project plan.

Conversion Test - Conversion testing involves testing programs or procedures used to convert data from existing systems for use in replacement systems.

Test will be performed for each conversion pass as follows:

- Extract legacy data for conversion
- Generate control totals for Patriot to balance to:
- Total valuation, land value, building value, yard items value by property class or use
- Total number of records by property class or use
- Total records in each file that are sent for conversion. If a database, just a row count by table is sufficient
- Patriot conversion manager to respond to the customer with the same control totals as above after loading the data into SQL, but before converting the data. If the totals don't match, the conversion stops until the totals balance.
- Patriot reports bad data in the conversion files received from the customer – for example, date fields out of range – September 31 or data inconsistencies – 2 family home with 1 bathroom.
- Patriot converts the data, even with the bad data.
- Patriot delivers the data to customer
- Install converted PRO SQL database
- Ensure all users can connect
- Users run through test plans
- Confirm values calculated in AssessPRO are acceptable

Test #	Module	Action	Verification	Date	Appr	Reliability Evaluation	Performance Evaluation	Testing Status
1	Address	From any parcel record, add property address.	Verify address on property record card screen and quick info page.			Blank-not evaluated	Blank-not evaluated	Blank - User Testing Req
2		From any parcel record, modify property address street and house number.	Verify address on property record card screen and quick info page.			1=Always Reliable 2=Sometimes Reliable 3=Never Reliable	1=Acceptable 2=Inconsistent 3=Unacceptable	1=Testing Complete 2=Issue Reported 3=Resolved
3	Land	Add 1 new land (market value) without influences. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
4		Add multiple land lines per parcel. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
5		Modify 1 LUC (land code) on existing land line. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
6		Modify multiple LUC's (land code) on existing land lines. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
7		Modify acreage amount on 1 existing land line. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
8		Modify multiple acreage amounts on existing land lines. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					

- D. MAINTENANCE AND SUPPORT:** The Contractor shall describe their software solution technical support options, including options and costs for the following. A copy of the maintenance agreement shall be included in the RFP response.

RESPONSE: Once Hanover County's system has been installed, **at least two members of the original implementation team** will remain intimately involved with the project and its continued support. Due to the customized nature and architecture of the Patriot product line (including both development and support) to meet Hanover County's unique business processes, Patriot application developers continue to remain directly involved in the maintenance and support of the product.

Hanover County will be supplied with a direct contact that worked on your implementation for at least the first two years of ongoing expert support. After this period, and paired with our in depth training process, the client is generally an experienced user, requiring only occasional support that can be provided through normal channels.

Software and hardware support is handled by Patriot’s Client Support Team. Both hardware and software specialists are available on a daily basis from 8:00 AM until 5:00 PM EST, Monday through Friday by phone, email and online (i.e. VPN, WebEx or GoToMeeting).

Support is provided through a specific format:

- The support desk takes the initial call. 90-95% of problems are solved at this level within 90 minutes. If support passes the problem on, the support desk is required to inform the client and offer a contact name, an anticipated procedure and a time estimate.
- If phone support is not adequate, a dial-in connection is made to view the database and attempt to correct the problem. High-level personnel are involved to provide expertise and ideas.
- Patriot will load the client database in our Corporate Office to attempt to either recreate the process or run the application to complete a process if time is of the essence.
- If a dial-in fails to correct the problem, Patriot will visit the client site.

Patriot will make arrangements with the County for support during off hours upon request. On-site assistance is available upon consultation between the County Staff and Patriot Properties Staff on an ‘as required’ basis, based on a scope and schedule agreed upon beforehand

1. Cost for tiers of service, including maintenance standard levels (system failures, critical process failures, non-critical process failures, and normal support issues). The costs shall include travel provisions in conducting the level of service noted.

RESPONSE: Please refer to section E. Total Cost of Ownership

2. Application support shall be designed to achieve a 100% operational rate.

RESPONSE: Patriot can meet this requirement

3. Hosted and SaaS solutions shall provide support levels and operational up-time commitments. In addition information on any operational reports that will be provided to the County should be documented.

RESPONSE: Patriot can meet this requirement

4. Detail other support options, including information on how these coverages will be provided:
 - a. Staff support (on-site, remote technical support)
 - b. Help desk/hot lines (business hours and off-hours, toll free)
 - c. Guaranteed response time objectives (RTO’s), along with the escalation process if RTO’s are not met.

- d. After implementation the County plans to establish a working group to enhance and expand the software solution. This group will meet on a regular basis. The selected Contractor shall designate project management and lead technical support staff who will be required to participate in these meetings (in-person or via conference call) with the County on a monthly basis.
- e. After year five, the annual maintenance fee will be the lesser of the current list prices or the previous year maintenance cost adjusted by the average of the Consumer Price Index, Urban Wage Earners and Clerical Workers (CPI-W), US City Average for the previous three calendar years (as published by the US Department of Labor, Bureau of Labor Statistics).

RESPONSE:

- The support desk takes the initial call. 90-95% of problems are solved at this level within 90 minutes. If support passes the problem on, the support desk is required to inform the client and offer a contact name, an anticipated procedure and a time estimate.
- If phone support is not adequate, a dial-in connection is made to view the database and attempt to correct the problem. High-level personnel are involved to provide expertise and ideas.
- Patriot will load the client database in our Corporate Office to attempt to either recreate the process or run the application to complete a process if time is of the essence.
- If a dial-in fails to correct the problem, Patriot will visit the client site.

- E. STANDARDS AND INTERFACES:** The Contractor shall describe their method(s) for data and application integration and interfaces, such as support for web services and various XML protocols.

RESPONSE: One of the initial steps we take is to understand in detail the requirements that this project must incorporate. We will work closely with your IT department and software integration requests to ensure that all necessary preparations are taken to ensure that IT will be comfortable with handling the administration of the new system.

5.3 ADVANCED TECHNOLOGY:

- A. BROWSER/WEB BASED INTERFACE:** The Contractor shall include a description of any web interfaces supported for the proposed software solution, including what browsers (and browser versions) are supported.

RESPONSE: Web-based Functionality – The system has an internet capacity for the public facing access to the database.

- B. DISASTER RECOVERY:** The Contractor should describe their experience with drafting and implementing disaster recovery plans and programs, including details on any disaster recovery solutions that are available from the Contractor.

RESPONSE: Patriot Properties maintains a sound disaster recovery process which we are happy to share the details of with the Hanover County IT Department. The focus of this disaster recovery process is to ensure our ability to predictably and rapidly restore our AssessPro services from an alternate location in the event we lose the availability of our primary processing center. We back up all data from the server environment nightly to an alternate, secure location.

Files are also routinely archived to offline media according to a rotation schedule that provides for the retention of weekly, monthly and yearly backups. We continually maintain and update our disaster recovery plan to reflect any changes in our software environment.

Periodically we even simulate an actual recovery situation to test our recovery process, to both validate and to improve the process we use to serve our customers.

For many years, we have been development partners with firms that include ESRI, Pictometry, Spatialest and others in order to bring the best and most useful technology to your team. We stay ahead of the curve by having our software ready for the next version of these companies' solutions before they are made available to the public.

- C. TABLETS, SMART-PHONES AND BROWSERS: The Contractor should describe if their software solution operates at any level on tablets or smart phones using the iOS, Android, or Windows operating system. If the software solution has a browser-based or app component the Contractor should describe what browsers and browser versions are supported (IE, Safari, Firefox, Chrome).

RESPONSE: Using Mobile tools incorporated in your AssessPRO product suite allows for comprehensive field data collection using a mobile collection device that can be customized to your requirements, including controlling what the field personnel can view and/or edit.

Utilizing mobile data collectors increase both the efficiency of gathering data directly while in the field and prepopulating some pertinent CAMA data (including valuation), but also greatly improves data reliability, particularly when integrated with a camera and GPS (SketchPro can incorporate GPS points to correctly position and scale your sketches to the real world) as information is entered only once; eliminating redundancy in data entry.

Users can typically use either a tablet or a laptop PC, depending on your Information Technology team's requirements. These devices can be good dual solutions for full functionality both in the field and in the office for select personnel.

- D. LASERFICHE DOCUMENT MANAGEMENT SYSTEM: The County uses LaserFiche document management system for digital archiving of documents. The Offeror should describe if their software solution integrates with LaserFiche and provide details of specifically how that integration works.

RESPONSE: Patriot Properties Offers n archiving solution called ArchivePRO; ArchivePRO allows the user to search, view, and print AssessPro Record Cards from previous fiscal years. All of the archived data bases are merged into one historical database. This allows the user to search for a parcel and see the property record card and all its contents from a "point in time" perspective. Annually, we will send you a CD/DVD containing the Record Cards (in PDF format) and a Microsoft Access database file of the fiscal year you are archiving. This data can be imported into your ArchivePro Viewer database that contains past archived data bases.

5.4 SOFTWARE & HARDWARE ACCEPTANCE:

All hardware and software shall be fully installed, configured, optimized, and tested prior to acceptance by the County. The Contractor shall describe their quality assurance procedures and user acceptance testing processes.

The Contractor shall develop an Acceptance Test Plan in coordination with the County which shall provide details for the acceptance testing process. The Acceptance Test Plan shall be approved by both the Contractor and the County. The Acceptance Test Plan shall address testing of all software, hardware, network, interfaces, and data conversion that the Contractor may provide or utilize as part of their solution. The Contractor shall describe their acceptance testing program, including forms, approvals, functionality testing, stress testing, disaster recovery, and response time elements for testing the performance of the product.

RESPONSE: A hallmark of any system deployed by the Patriot team is thorough and strictly-adhered-to testing procedures. The Patriot team will work with County staff to ensure that a quality assurance environment has been established that meets the specific testing and operational needs of County users.

Test data will be verified and the Test/Training environment established. The production deployment will include full software functionality including configuration and customization, working with the County's datasets.

The Patriot team will work very closely with County staff early in this project to define the format and content of user acceptance and integration tests. We will coordinate documentation, execute and record the testing, analyze and update the system as required. These are critical systems and county resources will need to be dedicated to these tasks during this period of between two and three weeks.

User acceptance and integration testing will be conducted prior to deployment of the system in the production environment. The testing plan will include procedures to be followed should elements of the delivered system fail these tests.

The Test Strategy detailed below is an excerpt from our larger set of testing plans that are for both internal and external procedures. Information relevant to the Hanover County PRO implementation below describes at a high level, the scope, approach, resources and schedule for the testing activities of the PRO applications. The Test Strategy document is maintained throughout the life of a project.

Patriot provides the team members responsible for testing our preformatted that details how testing will be managed for this project. The test effort is then planned, prioritized and executed based on the project priorities as defined in the Project Plan and Requirements Specification. This is a living document that is typically refined as the project progresses. The QA Manager, Product Manager, Project Manager, and Development Manager reviews and approves the final version of the Test Strategy document.

Unit Test - Unit testing is performed by developers to determine that individual program modules perform per the design specifications.

System Test - System testing is performed by the Test team. System testing will include many separate tests to ensure that the application will work as expected in the production. System testing includes stress testing, load testing, requirements validation, security testing, performance testing, etc.

With each build the Test Team will perform regression tests by executing manual tests after each successful build of the application, prior to release of the build for general testing use. This will include the re-testing of each item in each test script as well as the re-verification of each repaired defect that is identified.

Additional testing beyond the scripted test may be done when needed to exercise the application to verify error handling and system recovery due to incorrect data or entry into fields.

Integration Test - By this test the Test team will validate that the individually tested components and applications work correctly together as documented in the final project plan.

Conversion Test - Conversion testing involves testing programs or procedures used to convert data from existing systems for use in replacement systems.

Test will be performed for each conversion pass as follows:

- Extract legacy data for conversion
- Generate control totals for Patriot to balance to:
- Total valuation, land value, building value, yard items value by property class or use
- Total number of records by property class or use
- Total records in each file that are sent for conversion. If a database, just a row count by table is sufficient

Test #	Module	Action	Verification	Date	Appr	Reliability Evaluation 0-Always Reliable 1-Sometimes Reliable 2-Never Reliable	Performance Evaluation 0-Acceptable 1-Inconsistent 2-Unacceptable 3-Not Evaluated	Testing Status Blank - User Testing Req. + Testing Complete - Release Reported X-Not Evaluated
1	Address	From any parcel record, add property address.	Verify address on property record card screen and quick info page.					
2		From any parcel record, modify property address street and house number.	Verify address on property record card screen and quick info page.					
3	Land	Add 1 new land (marked value) without influences. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
4		Add multiple land lines per parcel. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
5		Modify 1 LUC (land code) on existing land line. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
6		Modify multiple LUC's (land code) on existing land lines. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
7		Modify acreage amount on 1 existing land line. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					
8		Modify multiple acreage amounts on existing land lines. Calculate parcel.	Verify ALL land data including values on: land screen, property record card screen, and valuation information screen.					

- Patriot conversion manager to respond to the customer with the same control totals as above after loading the data into SQL, but before converting the data. If the totals don't match, the conversion stops until the totals balance.
- Patriot reports bad data in the conversion files received from the customer – for example, date fields out of range – September 31 or data inconsistencies – 2 family home with 1 bathroom.
- Patriot converts the data, even with the bad data.
- Patriot delivers the data to customer
- Install converted PRO SQL database
- Ensure all users can connect
- Users run through test plans
- Confirm values calculated in AssessPRO are acceptable
- Validate that data is accurate by printing record cards from legacy system and PRO and comparing them side-by-side
- Issues in conversion pass are reported in the issues register
- Confirm that issues that were reported in the issues register have been fixed, and if not, report that issues still exist
- Customer fixes bad data reported by Patriot in the legacy system for the next conversion pass
- Report any customization in field labels that are requested for subsequent data pass

Any differences in data from the original source will be reported as defects and will be addressed by the development staff. Patriot is not responsible for the data quality or accuracy in the conversion and testing, this is the responsibility of the County.

Documentation Verification - Documentation verification involves reviewing for accuracy all supporting User Documentation, Help Files, and supplemental materials.

Acceptance Testing - This level of testing is performed by the customer to ensure that the system satisfies the agreed upon requirements for functionality, procedures, and usability.

Hanover County will have access to all test data that has been generated previously and will be responsible for generating whatever sets of transactions is required to test the system to their satisfaction within the agreed upon period of time with support from the Patriot project team.

Test Coverage - The test coverage will include known functions that exist in the previous version and new functions as listed in the requirements.

Specification for the current patch release and additional test data sets are designed by the PRO test team. The focus of the testing will be on the new features and functionality. The coverage for the testing of specific areas of the current release of the AssessPRO patch is detailed in the example below.

Defects Tracking - All defects and errors found during testing will be logged in the Gemini defect tracking tool. If any error in logic or functionality associated with a test script will be found, the test script will be corrected and modified prior to the next round of testing.

Patriot project team will verify that all necessary defects have been repaired. Necessary defects are defined as all defects that must be repaired before loading the system to the client server.

Critical Success Factors - Critical success for this project is based on delivery on time with all script passes completed and all defects closed and regressed.

Internal success will be measured by the completion of application test scripts (written, reviewed, and approved) when scheduled, and completion of the scheduled test cycles in a timely fashion (as scheduled in the project timeline in the project schedule). Metrics for this are the completed test scripts with notations concerning defects logged / repaired.

Performance Tuning- The new system will be up and running, processing transactions in parallel with the existing system. Several facets of the system will be tested at this point, including confirming that the hardware configuration is working correctly. This phase also gives you the opportunity to make additional changes before switching to the new system. Periodic reports will be generated to verify the accuracy of the system set-up, customer information, posting flows and system calculations.

5.5 SOFTWARE UPGRADES & PATCHES:

The Contractor shall describe their post-implementation software support, including how upgrades and patches are installed (test, production, quality control) and a summary of what their software maintenance agreement covers (responders should not simply attach their software maintenance service contracts).

- A. NEW SOFTWARE RELEASES:** The Contractor will issue new software releases containing problem corrections, minor enhancements, and major enhancements. Throughout the term of this contract, as long as the County is participating in the Contractors software maintenance program, the Contractor shall provide the County each new software release without additional charge. This shall include if the Contractor develops its software on a different operating system platform or using a different programming language. The Contractor shall provide reasonable assistance to help the County install, test, and operate each new software release at no additional cost.

RESPONSE: One of the most important aspects of corporate software is the timeliness of user support. The Patriot team recognizes that if a user cannot use the software to their fullest expectation, then it doesn't matter how great the software might be. We answer all questions immediately. If a question regards a software problem that causes the software to not function as designed, the programming staff's number one priority becomes the resolution of the problem. The update and support agreement will also supply you with all subsequent upgrades, enhancements and bug fixes for all future releases of the licensed applications as long as the County annually renews the agreement.

We maintain constant communication with our clients and this is particularly strong where we have such a broad user base as in Virginia and throughout the Southeast.

This level of communication will include upgrade discussions and what Patriot's AssessPRO software will do in anticipation of these changes so you and your staff know well in advance what is expected and what we will be doing to assist our users.

We are available to meet with your team for impact planning sessions either electronically or in person, depending on your needs. We maintain an office in the Southeast so personal representation of Patriot can be assured with minimal notification. Support to us is not only the occasional question or update - we work with you to have real ownership of a flexible system supported by our experienced team for years of smooth use.

As with the software upgrades addressed above, Patriot stays constantly abreast of all legislative changes as they occur and make available the necessary software updates and support to ensure those effects are completely incorporated into your enterprise system.

- B. THIRD PARTY SOFTWARE REQUIREMENTS:** The Contractor shall fully document all third party software requirements, including those that must be pre-installed or are installed as part of the Contractor's software package. The Contractor shall describe how it coordinates with third party software providers to ensure that the third party software is kept current and that security related releases are current for all required third party software. If Java is required, the Contractor shall describe how their software remains compatible with the latest major release of Java and how minor Java upgrades are incorporated.

RESPONSE: Patriot has designed our software to be an open system that allows for the flexibility of new and useful technologies be incorporated for a better user experience for our customers.

- C. PRODUCT ROADMAP:** The Contractor shall describe the product roadmap for the next two (2) planned releases of the proposed software solution.

RESPONSE: Planning and deployment is done individually as needed and at a state user group level in accordance with our maintenance agreement and software updates, training and support are managed on a case by case basis for each Virginia client, working with their IT and subject matter experts to complete the work in a coordinated and timely fashion.

5.6 DOCUMENTATION REQUIREMENTS:

The Contractor shall provide a list and description of all documentation provided as part of the implementation of their software solution, including overview descriptions of all major functions, detailed step-by-step operating procedures for each screen and activity, and technical reference manuals. The description shall include the format of the documentation (website, hard copy, or electronic), the currency of the documentation, and any restrictions on the County reproducing the documentation for its own use.

RESPONSE: Patriot specializes in providing government agencies with the tools necessary to maintain and support their software. In addition to training sessions throughout the project, your *PRO User Manuals, Advanced User Manuals* and other related software user documentation that are geared to making your staff as self-sufficient as possible so the County has the control and knowledge to update and modify your system with confidence to accommodate changing parameters over the years.

Patriot has developed robust user and administrator documentation that is made available to all clients. In addition to the requested hardcopy documentation, we provide editable online documentation and complete support.

Patriot includes training courses and materials created by dedicated staff members who specialize in writing and developing training courses and documentation in order to successfully have a level of knowledge transfer that is continually reinforced for all of the users of your new system. The step-by-step course materials are one of the keys to our early success for a high customer satisfaction so that we can later maintain long term comfort and satisfaction.

5.7 PAYMENT TERMS

- A. **SOFTWARE:** Unless otherwise agreed to, the County shall pay the Contractor for Licensed Software as follows. Alternative payment schedules that tie payments to the milestones identified in the project schedule will be considered. The County and the Contractor shall draft an Acceptance Testing plan for software implementation. Should the County not accept any Licensed Software module pursuant to the agreed upon Acceptance Testing plan, the Contractor shall return to the County the license fees that the County paid for that module within thirty (30) calendar days.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

1. Twenty Percent (20%) of the total Licensed Software license fees for each Licensed Software module shall be due and payable upon issuance of a County Purchase Order.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

2. Forty Percent (40%) of the total Licensed Software license fees for each Licensed Software module shall be due and payable upon the Contractors delivery and installation of the software.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

3. Forty Percent (40%) of the total Licensed Software license fees for each Licensed Software module shall be due and payable when the County notifies the Contractor of its acceptance of the delivered, installed, and tested Licensed Software module pursuant to the agreed upon Acceptance Testing plan.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

- B. **HARDWARE:** If hardware is purchased as part of this contract, unless otherwise agreed to, the County shall pay the Contractor for computer hardware as follows. The County and the Contractor shall draft an Acceptance Testing plan for computer hardware implementation.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

1. Fifty Percent (50%) of the total computer hardware fees shall be due and payable upon the Contractor's delivery and installation of the hardware component.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

2. Fifty Percent (50%) of the total computer hardware fees shall be due and payable when the County notifies the Contractor of its acceptance of the delivered, installed, and tested computer hardware pursuant to the agreed upon Acceptance Testing plan.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

- C. DATA CONVERSION: Unless otherwise agreed to, the County shall pay the Contractor for data conversion services as follows. The County and the Contractor shall draft a Data Conversion Plan that establishes details for any data conversion project, including an Acceptance Testing plan.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

1. Twenty Five Percent (25%) of the total data conversion fees shall be due and payable upon approval by the County and Contractor of the Data Conversion Plan.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

2. Twenty Five Percent (25%) of the total data conversion fees shall be due and payable upon approval by the County and Contractor of the first delivery of the conversion.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

3. Fifty Percent (50%) of the total data conversion fees shall be due and payable upon final acceptance of the data by the County in accordance with the Data Conversion Plan, including the Acceptance Testing plan.

RESPONSE: These terms are acceptable to Patriot Properties, Inc.

- D. PROJECT MANAGEMENT & OTHER CONSULTING SERVICES: Services that are provided by the Contractor on an hourly basis shall be invoiced monthly based on the hours worked that month not to exceed the total hours included in the proposed cost for services to implement the project.

RESPONSE: N/A (Not Applicable)

- E. TRAVEL FEES: All travel shall be pre-approved by both the selected Contractor and the County's project manager. Such travel and living expenses will be governed by the GSA CONUS per diem rates as published for the period in which the travel occurs. Travel related expenses shall be invoiced on a monthly basis as incurred.

RESPONSE: N/A (Not Applicable) Travel expenses are included

- F. MAINTENANCE FEES: Maintenance fees should be outlined as described in section 5.2(D). Maintenance fees shall initiate one year after the system is live and in production.

RESPONSE: Patriot Properties is willing to hold the maintenance cost at \$39,500 per year for years two and three (There Are No Maintenance Costs in Year One). We would also guarantee that the maintenance fee would not increase more than 5% total for years Four and Five. Consequently, the maintenance and extended warranty costs would be \$0 in year one, \$39,500 in year two, \$41,475 in year three, \$41,475 in year Four and \$41,475 in year Five. This would give Hanover County cost certainty through Fiscal Year 2019. Patriot Properties would also agree to a CAP on Years (6-10) not to exceed a 5% increase in any individual Fiscal Year.

5.8 SOURCE CODE ESCROW:

- A. GENERAL:** The Contractor shall furnish the County with Source Code for the Licensed Software. The Contractor shall describe its solution for meeting this requirement, but solutions may include depositing the software source code with a vendor approved by the County naming Hanover County as a beneficiary or the Contractor may utilize the County's Department of Information Technology as the Escrow Agent.
- B. ESCROW UPDATES:** The Contractor shall provide details on the format of the source code, if instructions for use are provided for the source code, and currency of the source code.
- C. RELEASE OF SOURCE CODE TO THE COUNTY:** The Contractor shall include in their RFP response any third party escrow agreements that are presently in place that could be utilized by the County. The agreements shall include the terms and circumstances upon which the source code would be released to the County. Any fees that will be required of the County to enter into the source code agreement shall be provided.

RESPONSE: Access to the Source Code. A copy of the printed source code for Basic Licensed Material and/or Optional Licensed Material and the mechanism by which the licensee's particular source code may be displayed shall be held in a bank safe deposit box. Should Patriot Properties, Inc., file for bankruptcy, dissolve, or otherwise cease to exist, the licensee shall have access to the source code at the aforementioned place through the Corporation Counsel.

Such access shall be limited to determination or resolution of problems relating to the licensee's exclusive use of the software. This copy of the source code for the licensee's exclusive use shall in no way be considered an asset of the Customer.

5.9 REPORTING & AUDITING:

- A. AUDITING:** The Contractor shall describe its auditing capabilities, including details on tracking attempts to login, access, create, delete, or change accounts, permissions, or audit logs. Details on what information is captured and stored in audit files and how long that information is retained shall be provided.

RESPONSE: Patriot's AssessPRO AP5 .Net solution allows for easy setup of roles that lets you simplify the workspace for users. The system has a variety of tools available to meet all of the requirements and improvements in managing revenue workflow and data. Customizable for tracking, reporting and notifications on data development, this solution includes security settings for viewing, not viewing editing, and reporting data across the system in both past and future years – in one seamless administrative step.

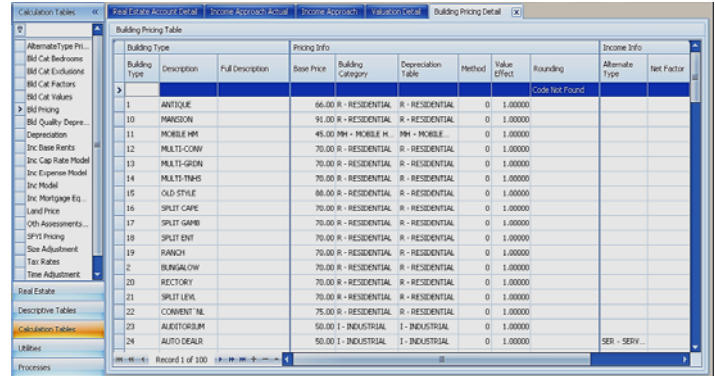
Audit Trail

In the *Action* column, there are only three codes to quickly provide useful information: "I", "U" and "D." The code "I" shows any data that has been inserted. The code "U" shows any data that has been updated. And the code "D" shows any data that has been deleted.

The Audit Trail also records the "before" and "after" characteristics of every change to every parcel.

In addition to this quick utility, Patriot provides **total access to the revision audit trail**. The complete database audit records can be viewed in the Audit Trail section of the Advanced Utilities.

Patriot's PRO suite of CAMA tools is designed to enable our clients to track all manner of information in addition to edit audit trails to evaluate and improve upon internal operations.



Building Type	Description	Full Description	Base Price	Building Category	Depreciation Table	Method	Value Effect	Rounding	Code Not Found	Alternate Type	Net Factor
1	ANTIQU		66.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
10	MANOR		91.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
11	MOBILE MH		45.00	MH - MOBILE H.	MH - MOBILE...	0	1.00000				
12	MULTI-FAM		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
13	MULTI-TRAIL		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
14	MULTI-TRAIL		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
15	OLD STYLE		88.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
16	SPLIT CAPE		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
17	SPLIT GAMB		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
18	SPLIT ENT		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
19	RANCH		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
2	BUNGALOW		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
20	RECTORY		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
21	SPLIT LEVEL		70.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
22	CONVENT		75.00	R - RESIDENTIAL	R - RESIDENTIAL	0	1.00000				
23	AUCTION		50.00	I - INDUSTRIAL	I - INDUSTRIAL	0	1.00000				
24	AUTO DEALR		50.00	I - INDUSTRIAL	I - INDUSTRIAL	0	1.00000			SER - SERV	

- B. REPORTING:** The Contractor shall describe how auditing information is retrieved by authorized users, including formats, timing, and any automated reporting capabilities within the software solution.

RESPONSE: Our team focuses on working closely with your staff to streamline Workflow processes by knowing how to best use our software to enable Hanover County leadership to create and manage workflow items including assigning tasks, assignment notification, status updates, internal approval and routing and more to provide managers with the resources needed to actually track improvements to business processes between groups - seamlessly.

11. Identify user group(s) that are available for your application and typical activities / events (State, local, and /or national)

RESPONSE: Patriot runs National User meetings and also hosts a user meeting at the annual VAAO conference.

12. Please state what is the recommended network bandwidth for a typical customer of our size and complexity.

RESPONSE:

- **Windows Server 2008R2 or 2012**
- **Intel Xeon 30ghz+x64**
- **16-32 GB Memory**
- **2x500 GB Hard –drives on a Raid 1 (OS Partition)**
- **6x500 GB Hard-drives on a Raid 5 (Data Partition)**
- **Tape Backup Unit if Applicable**

D. SPECIFIC PLANS FOR PROVIDING THE PROPOSED SERVICES.

1. Provide a project schedule and proposed start and implementation date based on the Contractor's current resource availability.

RESPONSE: Patriot Properties is fully prepared to begin this project immediately. We understand that Hanover County has an ideal schedule which we are certain our team can comfortably accommodate and will be reflected in the final agreed upon project plan.

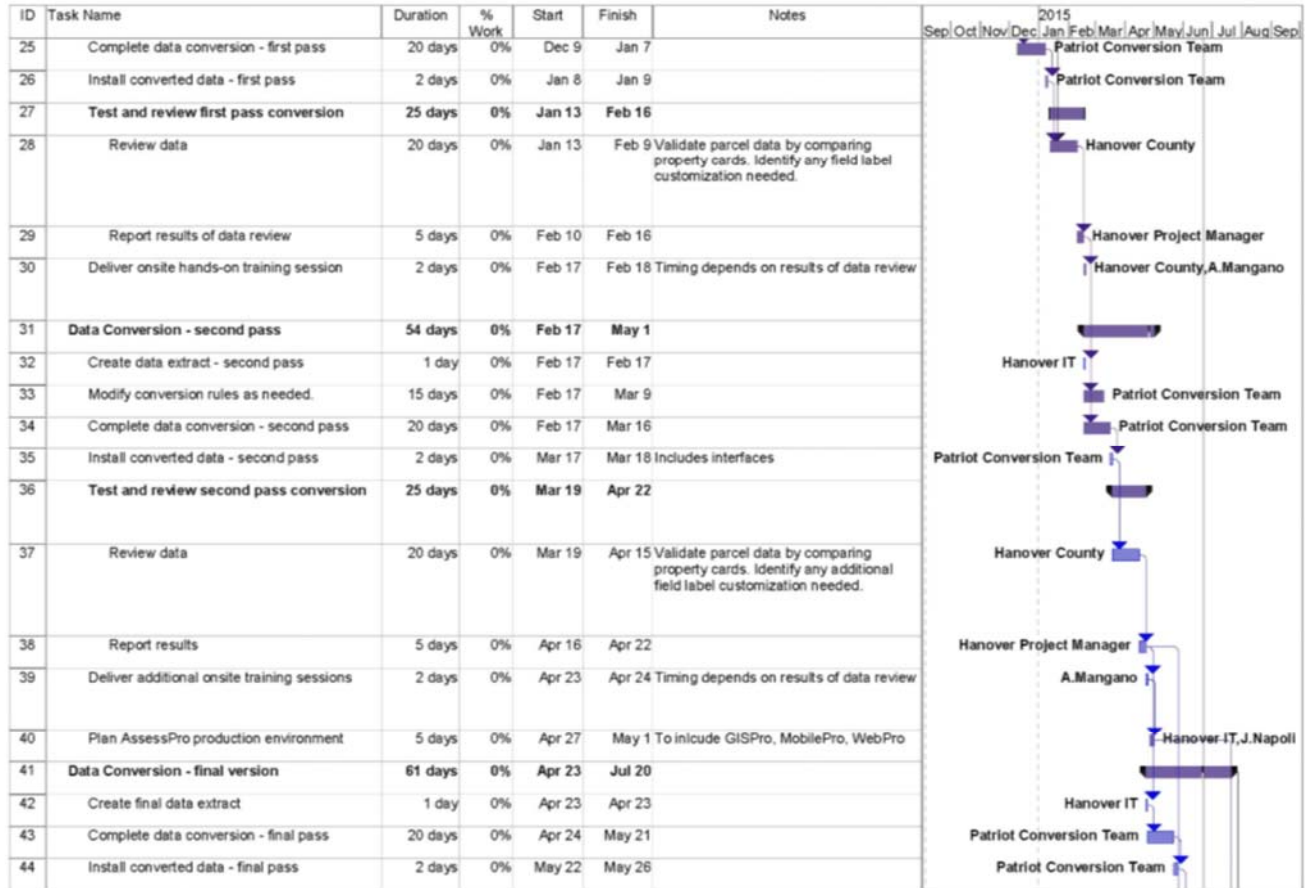
Hanover County's **AssessPRO** implementation project can start on December 1, 2014 and we can confidently meet a Go Live date of September 1, 2015. This schedule assumes the AssessPRO CAMA software and third party integrations noted.

2. Provide a sample implementation plan.

RESPONSE: The implementation would begin in December of 2104 with a “Go Live” date of September 1, 2015.

Hanover County VA AssessPro Implementation Project Plan

April, 2014



Hanover County VA AssessPro Implementation Project Plan

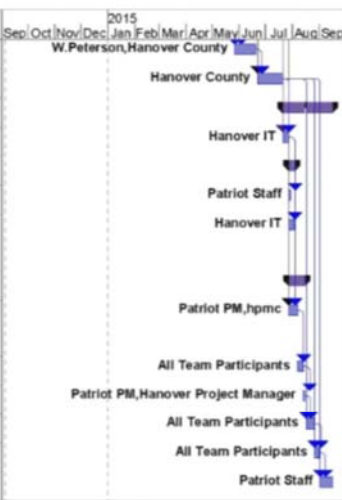
April, 2014

ID	Task Name	Duration	% Work	Start	Finish	Notes	
1	AssessPro Implementation	202 days	0%	Dec 1	Sep 15		
2	Hold Implementation Kickoff meeting	1 day	0%	Dec 1	Dec 1		Hanover Project Manager, Patriot PM, Hanover
3	Finalize project plan	2 days	0%	Dec 2	Dec 3		Patriot PM, Hanover Project Manager
4	Maintain project plan	190 days	0%	Dec 4	Sep 2		Patriot PM
5	Monitor and track project issues	200 days	0%	Dec 2	Sep 14		Patriot PM
6	Develop SOWs	30 days	0%	Dec 2	Jan 14	Interfaces to Bright system and ArcGIS	Patriot PM, Hanover Project Manager
7	Complete planning tasks	120 days	0%	Dec 2	May 20		
8	Plan AssessPro test environment	5 days	0%	Dec 2	Dec 8	To include GISPro, MobilePro, WebPro	Patriot Staff, Hanover IT
9	Determine any new hardware needs	3 days	0%	Dec 9	Dec 11		Hanover IT, Patriot Staff
10	Establish AssessPro test environment	15 days	0%	Dec 12	Jan 5		Hanover IT
11	Install AssessPro test system	5 days	0%	Jan 6	Jan 12		
12	Install AssessPro components	2 days	0%	Jan 6	Jan 7		Patriot Staff
13	Configure user workstations for AssessPro	5 days	0%	Jan 6	Jan 12		Hanover IT
14	Develop AssessPro testing plans	51 days	0%	Dec 4	Feb 16		
15	Draft AssessPro UATs	30 days	0%	Dec 4	Jan 30	Verify AssessPro supports County practices	Hanover County
16	Review UATs	5 days	0%	Feb 2	Feb 6		Patriot PM, Hanover Project Manager
17	Finalize AssessPro UATs	6 days	0%	Feb 9	Feb 16		Hanover County
18	Plan GIS configuration	2 days	0%	Jan 13	Jan 14		J. McCathern, Hanover County
19	Develop client features per SOWs	90 days	0%	Jan 15	May 20		
20	Develop Bright system interface	60 days	0%	Jan 15	Apr 8		Patriot Staff, Hanover IT
21	Develop ArcGIS interface	30 days	0%	Apr 9	May 20		Patriot Staff, Hanover IT
22	Data Conversion - First pass	55 days	0%	Dec 2	Feb 18		
23	Create data extract - first pass	5 days	0%	Dec 2	Dec 8		Hanover IT
24	Perform data mapping	20 days	0%	Dec 9	Jan 7		Patriot Conversion Team

Hanover County VA AssessPro Implementation Project Plan

April, 2014

ID	Task Name	Duration	% Work	Start	Finish	Notes
45	Perform table calibrations (onsite/remote)	16 days	0%	May 27	Jun 19	
46	Perform user acceptance testing	20 days	0%	Jun 22	Jul 20	
47	System Go Live	40 days	0%	Jul 21	Sep 15	
48	Establish AssessPro production environment	5 days	0%	Jul 21	Jul 27	
49	Install AssessPro Live system	5 days	0%	Jul 28	Aug 3	
50	Install production AssessPro components	2 days	0%	Jul 28	Jul 29	
51	Configure user workstations for AssessPro	5 days	0%	Jul 26	Aug 3	
52	Develop Implementation Script	14 days	0%	Jul 28	Aug 14	
53	Draft implementation script for go live.	8 days	0%	Jul 26	Aug 6	Incl. all events of days surrounding go-live: Loading laptops, etc.
54	Review draft implementation script	5 days	0%	Aug 7	Aug 13	
55	Finalize implementation script	1 day	0%	Aug 14	Aug 14	
56	Complete implementation script activities	8 days	0%	Aug 17	Aug 26	Data conversion, validation, etc.
57	Go live with AssessPro system	3 days	0%	Aug 27	Aug 31	
58	Deliver final training and provide support	10 days	0%	Sep 2	Sep 15	Simultaneous with go live



Page 3

We have available a detailed electronic version in MS Project format that includes deliverables, milestones and county resource requirements by task to provide Hanover County as we work with your team to finalize a schedule that suits your project needs completely.

The schedule details each proposed project step and includes all related phases, activities, tasks, comments milestones, decision points, training plans and deliverables that is reflected elsewhere in this response.

We will be able to complete this project on time and on budget given our expectation of upcoming resource demands and county personnel availability.

E. TOTAL COST OF OWNERSHIP

Total Cost of Ownership assessment over 5 years to include any vendor supplied hardware costs, software costs, direct costs, indirect costs, installation costs of hardware/software, systems management, maintenance costs, and data conversion services and life cycle estimates for operating, upgrading, and maintaining the solution.

RESPONSE:

<i>AssessPRO AP5 Implementation</i>	Initial Cost	Conversion	Annual Support
Base Software, Version AP5/.Net, REAL ESTATE	\$103,750.00		\$26,000.00
Project Management and Administration		\$12,000.00	
Project Initiation & Planning		\$7,000.00	
Gap Analysis		\$11,000.00	
Database Mapping for Conversion		\$11,000.00	
1st Pass Database Conversion		\$15,000.00	
Training 1 Remote (1 pers,1 Day)		\$1,600.00	
2nd Pass Database Conversion		\$20,000.00	
Training 2 On Site (2 ppl, 3 Days)		\$12,900.00	
3rd Pass Database Conversion		\$5,000.00	
Training 3 Onsite (2 ppl, 3 Days)		\$12,900.00	
Custom Interface with Bright System		\$35,000.00	
GIS (Edit/SyncPRO) Integration	\$22,375.00		\$4,500.00
WebPro (Hosted) Online Property Search	\$11,900.00		\$2,000.00
Mobile - /MobilePro Software	\$12,675.00		\$3,500.00
Marshall & Swift - Module / Integration	\$11,475.00		\$3,500.00
Enterprise Testing (CAMA/PP/GIS)		\$9,800.00	
Training 4 Onsite (2 ppl, 3 Days)		\$16,900.00	
Go Live onsite Support (1 pers, 5 days)	-	\$10,450.00	
Total	\$162,175.00	\$180,550.00	\$39,500.00

TOTAL: Software, Labor and Expenses	\$342,725.00
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Total Cost of Ownership assessment over (5) years:	\$504,675.00
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All networking and hardware related to this implementation is the responsibility of Hanover County to provide, install, configure, and maintain prior to the testing phase of the CAMA implementation.

No Patriot software support and license fees for the first year. Support and license fees commence in year two on the first anniversary of the contract signing.

Patriot Properties is willing to hold the maintenance cost at \$39,500 per year for years two and three (There Are No Maintenance Costs in Year One). We would also guarantee that the maintenance fee would not increase more than 5% total for years Four and Five. Consequently, the maintenance and extended warranty costs would be \$0 in year one, \$39,500 in year two, \$41,475 in year three, \$41,475 in year Four and \$41,475 in year Five. This would give Hanover County cost certainty through Fiscal Year 2019. Patriot Properties would also agree to a CAP on Years (6-10) not to exceed a 5% increase in any individual Fiscal Year.

The AssessPRO GIS Viewer requires an ESRI ArcGIS Runtime Engine license per User/Seat with a fee of approximately \$400 per User/Seat for additional Users, but it is not needed if the county has an ESRI enterprise license or ArcGIS license already on the desktop. The GIS Viewer is compatible with v10.0 to 10.2 ESRI products.

Marshall & Swift maintenance costs to be paid to Patriot are not included in this estimate and will be a direct pass-through. For FY 2012, the Marshall & Swift estimated cost for Commercial is \$0.209 per parcel and for Residential is \$0.179 per parcel.

There are required Licensing fees for a SQL Server. The one time server software cost is about \$600-\$800 and at an additional cost for each work station that will be running AssessPro is about \$150-\$200/seat.

ATTACHMENTS

- **RFP Cover Sheet and All (5) Addenda Acknowledgments**
- **Attachment A - Vendor Data Sheet**
- **Attachment B - Virginia State Corporation Commission Registration Information**
- **Attachment C - Proprietary/Confidential Information Identification**
- **Attachment D - Deviations Exceptions Exhibit**
- **Attachment E - Hosted or Software-as-a-Service Terms and Conditions**
- **Attachment F - Remote Access Policy**
- **Attachment G - Software Functional Requirements Matrix**