

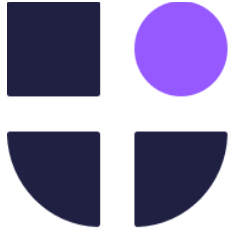
REQUEST FOR PROPOSAL • NO. 746

# Stamford, CT



AUGUST 30, 2018

## Parking Ticket, Permit and Civil Citation Management Services



Passport

**Enforcement**<sup>SM</sup>

# Parking Ticket, Permit and Civil Citation Management Services No. 746

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Due: August 30, 2018 @ 4PM EST

For:  
**Stamford, CT**  
888 Washington Boulevard  
Stamford, CT 06904

From:  
**Passport**  
128 South Tryon Street, Ste. 2200  
Charlotte, North Carolina 28202  
USA  
(704) 837-8066

This RFP Proposal response includes trade secrets or other proprietary data (data) that may not be disclosed outside the City and may not be duplicated, used or disclosed in whole or in part for any purpose other than to evaluate this Proposal submittal. The data subject to this restriction are contained in sheets **(15 [Harvester information], 90 [Disaster Recovery Plan], 4-5-6 [References],18-43-52-73 [Reports])**. The City, for purposes of this provision, will include any consultant assisting in the evaluation of Proposals. If, however, a contract is awarded to this Respondent as a result of or in connection with the submission of this data, the City has the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the City's right to use information contained in the data if it is obtained from another source without restriction unless required by any applicable public records law and no exemptions to disclosure apply, and then only to the extent required.



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## LETTER OF TRANSMITTAL

Passport Labs, Inc  
128 S Tryon St  
Suite 2200  
Charlotte, NC 28202

Passport Labs, Inc. (“Passport<sup>1</sup>”), is pleased to submit its proposal for a Parking Citation and Permit Processing Proposal (RFP No. 746) for the City of Stamford, CT (the “City”). Each item detailed in this proposal was strategically decided to provide maximum value to the City. Through its dedication to client success, Passport will provide the City with the industry’s best parking citation issuance, processing, and collection platform built on Passport’s experience, dynamic technology, and commitment to ongoing service to the City.

Passport has a strong Connecticut and Tri-State presence, providing parking technology services for clients like the Cities of New Haven, New London, West Hartford and the Hartford Parking Authority. Specifically in New Haven, under the City’s guidance, Passport has transformed the way the City manages their parking operations through its various parking platforms, which include a mobile payment for parking application (“GoNewHaven”), enforcement and permitting platform, and a robust backend management software tool. These initiatives drove an 18% higher payment compliance, resulting in a 10%+ revenue increase in the first few years alone.

It is through these unique relationships that Passport has developed its parking citation and permit processing platform that exists today. The platform will provide the City of Stamford with mobile handheld ticket issuance and equipment, online payment and appeals, end to end citation processing and collections, parking permit management, and the industry’s most data-driven backend management software.

Passport also supports citation and permit management platforms in Albany (NY), Rye (NY), Portland (ME), the New York City Housing Authority (NYCHA) and Metro North Rail (NY). Passport is committed to bringing this same expertise to the City of Stamford in a timely manner, using the industry’s strongest implementation, product, and development teams to deliver a best in class solution.

Passport’s Android-based ticket issuance and monitoring application, OpsMan Mobile, will provide the City’s parking enforcement officers the means to easily monitor parking and issue citations to violators. Violators will have the ability to pay tickets immediately following their issuance through several means, increasing the speed of payment, and total yield. Additionally, by bringing the City’s parking permit online, permit holders will never have to worry about lost permits, and the the City will realize a significant savings in both time and dollars spent on administration of the program. Operator Management, (“OpsMan”) Passport’s backend software management tool, will provide the City with an engine to drive the entire platform from extensive reporting, live enforcement officer tracking, data analytics, system setup, and more.

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<sup>1</sup> Passport’s State of Incorporation is Delaware, and we hold a foreign registration in the State of Florida.





## EXPERIENCE & QUALIFICATIONS

*Brief description of your firm, including qualifications, experience and ability to fulfill the scope of work described in this RFP. Identify relevant special licensing or registration held by key professionals assigned account responsibilities with state, federal or other regulatory agencies.*

Passport Labs, Inc. is a privately held Delaware C-Corporation, registered as a foreign entity with the state of Florida, backed by institutional investors Bain Capital, Grotech Ventures, and MK Capital. Since 2013, Passport has raised a total of \$60MM in three equity funding rounds, with the latest round led by Bain Capital, resulting in the largest funding round in the parking industry. With its funding, Passport will continue to build out its development and support teams, accelerate the iteration cycle of its current products, and break into new markets and verticals to give public entities an increasingly robust suite of products for their parking and transportation needs. Passport currently employs 150+ people, performing all core engineering in house, and paving the way for the future of parking and transit.

For the past seven years, Passport has taken a consultative approach with each client, gathering feedback, listening to problems, and developing solutions, which are tested in the field. Through these meetings with city and parking managers, Passport discovered that there was a disconnect between the effort and consideration going into developing parking programs and the off the shelf systems that were being deployed in the market.

Passport's suite of products (*Parking, Enforcement, and Transit*) service over 450 clients, 80+ of which use Passport's Enterprise Solution (*Parking and Enforcement*), all of whom have remained with Passport even on month-to-month contract terms. Notably, Passport's Enterprise Platform serves Omaha, NE; New Haven, CT; Salt Lake City, UT; and Brookline, MA. The combination of Passport's top two platforms gives the City a single back end tool to analyze and manage its entire parking operations, run a myriad of reports, and provides the end user a more convenient way to pay for parking sessions and citations.

*Enforcement* by Passport allows cities to easily monitor parking sessions and permits, issue, process, and collect parking citations and fines. Passport's issuance software, OpsMan Mobile, reduces the time it takes to issue a citation by utilizing dynamic LPN lookups, locally stored transaction data and pre-populated fields, including the issuing officer's name, badge number, and signature. Once a citation is issued, the parker is able to pay the fine in real time on either the Parking application or from Passport's payment portal: ResolveMyCitation ("RMCPay"). In addition to issuance and payment processing, Enforcement also automates the collection process, sending out delinquency notices on a pre-set schedule, escalating fines as necessary, queueing up appeals submissions, generating and mailing adjudication results notices, and reconciling accounts upon payment.

With Passport's Enforcement solution, the City of Stamford will have an efficient way to enforce parking while in addition to a seamless parking management experience. Passport has long anticipated an opportunity to partner with the City of Stamford and considers the following experience to be key considerations in the City's evaluation of Passport as the most qualified proposer:



### A Strong Regional Presence

- Passport has successfully driven up payment compliance and operational efficiency with the City of New Haven (see Appendix for New Haven Case Study). Additionally, Passport supports both Albany (NY) and Metro North Rail (NY) with its suite of Mobile Payments, Permits and Enforcement.



### A Fully-Integrated Platform

- Passport offers the City of Stamford a fully integrated suite of parking software, including an End-to-End Enforcement solution (as outlined in this RFP), along with other value-added services such as Digital Permits, Mobile Payments, and a robust backend software management tool (“OpsMan”).
- Passport has developed a deep integration with the City of Stamford’s current LPR vendor Genetec. Data and images captured by Genetec LPR scans will be automatically transmitted to Passport’s ticket issuance software (“OpsMan Mobile”), so that Enforcement officers only have to print the ticket.
- Passport enlists CheckALT (Klik Technologies) as its subcontractor for the City’s Lockbox requirements, whose main processing site is located in Valley Cottage, NY. Passport also maintains a partnership with Linebarger Goggan Blair & Sampson, LLP Attorneys at Law to perform any necessary “secondary” collections, at the City’s request.
- Passport is directly integrated with the State of CT DMV and utilizes NLETS for all out-of-state DMV lookups.



### Commitment to Optimization

- Passport commits its team of resources to ensure the City of Stamford receives and further develops the best solution for its parking operations.
  - Executive Leadership, Client Success, Service Delivery, Product Management, and Software Engineering
- Passport commits its technology roadmap to drive innovation and efficiency for the City of Stamford, based on a direct partnership and further supplemented by over 300+ other municipalities contributing to the growth and optimization of the platform.

## References

<b>City</b>	New Haven, CT
<b>Contract Start Date</b>	September 2014
<b>Scope of Services</b>	Passport currently provides Mobile Payment and Citation Management platforms to the City of New Haven, CT with Harvester Collections. Passport also has an integration with Parkmobile in New Haven.
<b>Tickets Processed Annually</b>	150,000 tickets / year
<b>Contact</b>	Michael Pinto
<b>Address</b>	200 Orange Street, New Haven, CT 06510
<b>Phone</b>	(203) 946-8069



<b>Email</b>	mpinto@newhavenct.gov
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<b>City</b>	Portland, ME
<b>Contract Start Date</b>	March 2017
<b>Scope of Services</b>	Passport currently provides Mobile Payment and Citation Management platforms to the City of Portland, ME. The City will be adding Passports Harvester (collecting on older outstanding citations) services at the end of 2018. This project was completed on time and within budget.
<b>Tickets Processed Annually</b>	120,000 tickets / year
<b>Contact Name</b>	John Peverada
<b>Address</b>	389 Congress St., Portland, ME 04101
<b>Phone</b>	(207) 874-8444
<b>Email</b>	jbp@portlandmaine.gov

<b>City</b>	Asheville, NC
<b>Contract Start Date</b>	September 2017
<b>Scope of Services</b>	Passport currently provides Mobile Payment and Citation Management platforms to the City of Asheville, NC. This project was completed on time and within budget.
<b>Tickets Processed Annually</b>	22,000 tickets / year
<b>Contact</b>	Ken Putnam
<b>Address</b>	PO Box 7148, Asheville, NC 28802
<b>Phone</b>	(828) 259-5405
<b>Email</b>	kputnam@ashevillenc.gov

<b>City</b>	Arvada, CO
<b>Contract Start Date</b>	July 2016
<b>Scope of Services</b>	Passport currently provides the Citation Management platform to the City of Arvada, CO. This project was completed on time and within budget.



<b>Tickets Processed Annually</b>	6,000 tickets / year
<b>Contact</b>	Patrick Hire
<b>Address</b>	1899 Wynkoop St., Suite 375, Denver, CO 80202
<b>Phone</b>	(303) 291-1111 x 130
<b>Email</b>	phire@lazparking.com

Please see Appendix C pg. 96 for Case Studies on the aforementioned references.

## KEY PERSONNEL

Passport designates a different point of contact at each stage of the onboarding process. Before the Notice to Proceed, the City's main point of contact will be the Regional Director of Sales, Conor Kelly. At the Notice to Proceed, Passport will organize a kick-off call to introduce the entire team and transition the City's point of contact to the implementation specialist, Mike Mohler. Mike will be in contact with the City on a weekly basis, at minimum, to talk about where the project stands and upcoming project pieces. Please see below for the designated Stamford project team:

### Stamford Project Team

Sales Contact



#### **Conor Kelly, Regional Director of Sales**

Conor Kelly is one of Passport's most tenured ambassadors, covering the Northeastern United States and parts of Canada. During his time at Passport, Conor has been vital in helping to implement the ParkBoston application, P\$ Mobile Service in Montreal, Buffalo Roam in Buffalo (NY), in addition to revitalizing parking technology in White Plains (NY), New Haven (CT) and Metro North Rail. Conor received his Bachelors of Arts in Economics from East Carolina University

(704) 899-5302

[conor.kelly@passportinc.com](mailto:conor.kelly@passportinc.com)

Project Contacts



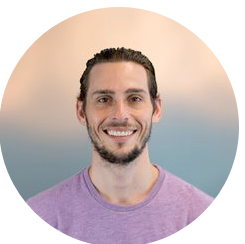
#### **Mike Mohler, Project Manager**

Mike comes to Passport from the City of New Haven with 3 years of industry experience as Deputy Director of Transportation, Traffic, and Parking as well as Manager of Parking Enforcement. While at the City, Mike ran the implementation of a Citation Management overhaul and launched a whitelabel Parking App. Prior to working for the City, Mike had accumulated 8 years of people management, customer service, and project management through the retail industry. Mike received his Bachelor of Science in Graphic Design from Southern Connecticut State University and is currently pursuing his CAPP certification.



#### **Chris Watt, Client Success Manager**

Chris provides a wealth of knowledge to Passport's clients, boasting more than 9 years of customer service, management, and client consultation. As a member of the International Parking Institute Membership Committee and organizer of the Passport Client Advisory Board, he has been able to stay well acquainted with the industry as a whole. Chris works with some of Passport's largest client-partners to maximize revenue through shared growth and proficiency of the software. Chris received his Bachelors of Science in Communication from Kennesaw State University in Georgia.



#### **Michael Rafferty, Product Manager: Enforcement**

Prior to joining the Product Management team, Michael was responsible for building Passport's Service Delivery team from the ground up as well as leading some of the largest implementations in North America, including implementing Passport's Citation Management solution for the cities of New Haven and Salt Lake City. Michael has a unique perspective from this experience, which makes him a highly effective product manager for the Citation Management Platform. Michael graduated summa cum laude from the University of Florida with his B.S. in Business Administration as well as with minors in Statistics and Actuarial Science.



### **Spencer Harrell, Product Support Engineer**

Spencer Harrell is part of Passport's Product Support Team. He acts as the first line of testing and qualifying code bugs from configuration errors, as well as communicating those bugs to Passport development teams for further analysis and repair. He provides a deep understanding of our products and their technical aspects. Prior to Passport, Spencer attended Winston-Salem State University where he received his Bachelor of Science degree in Mathematics.

## Corporate Officers



### **Executive Team: Bob Youakim, CEO & Managing Partner**

Bob brings over 15 years of business development, finance, and project management expertise to Passport and its clients. Bob was instrumental in leading the Client Management and Implementation of *ParkChicago*, the first large-scale private label application in the market and largest mobile pay implementation in the United States. Bob has also managed Passport's marquee deals: *ParkVictoria*, *MobileMeter*, and *ParkBoston*. Prior to founding Passport, Bob served as a Vice President in investment banking along with various audit and consulting roles. Bob received his M.B.A. from the Kellogg School of Management at Northwestern University and his Bachelors of Science from the University of Illinois. Bob is also a Certified Public Accountant.



### **Executive Team: Khristian Gutierrez, CRO & Managing Partner**

Khristian brings 8 years of corporate finance, marketing, and project implementation experience to Passport's team. Khristian has been responsible for overseeing all product development for the Toronto Parking Authority, North America's largest mobile pay for parking deployment. Khristian also led the deployment of Passport's first mobile ticketing program (transit mobile payments) in Columbia, SC. Prior to Passport, Khristian served as an Analyst in investment banking. Khristian received his M.S.F. from the Hough Graduate School of Business at the University of Florida where he also received his B.S. degree from the Warrington College of Business Administration.



### **Executive Team: Brad Powers, CTO & Managing Partner**

Brad brings 15 years of proven experience in designing, building, and deploying highly scalable applications to the Passport team. Brad has led the UI/UX designs and architecture for North America's largest multi-modal urban mobility applications, *ParkChicago*, *Green P* (Toronto), and *ParkBoston*. Prior to Passport, Brad was the Solution Architect at Verian where he helped build the Operations and Development groups within the company. He also led the largest P2P implementation to date for the United States Postal Service. Brad was born in West Chester, PA and received his Bachelors of Science from Arizona State University.



### **Heather Scott, Director of Service Delivery**

Heather Scott, PMP, is the Director of Service Delivery at Passport, overseeing project management for all clients from project initiation to design and implementation. With 17 years of experience in project management in a broad range of industries, both with startups and Fortune 100 companies, Heather plays an essential role in delivering exceptional client experiences at Passport. Heather previously served as Senior Project Manager at Skookum, a digital strategy, design, and development firm. Prior to working with Skookum, she was Client Manager at Fuel Sports Management Group, focused on sponsorship acquisition for NASCAR. Heather has also held positions at Phase 3 Marketing & Communications and ESPN. She holds a B.S. from Springfield College and a PMP certification from the Project Management Institute.



Passport is committed to focusing on clients and giving its full attention to executing on highly efficient implementations supported by first-rate client experiences. Heather has implemented a clearly outlined and documented process for launching client projects that ensures quality control and adherence to deadlines. She has an extensive technical background in complex systems implementations, as well as a deep understanding of systems interdependencies. As Director of Service Delivery, she ensures that Passport implementations follow the tenets of PMBOK, which include putting detailed project plans together, following implementation best practices, and setting stakeholder and decision maker communication protocols.

Full resumes for the main point of contacts are available in Appendix B on pg 92.






## SCOPE OF SERVICES

### General Comments

The following is a brief list of services the proposer will be responsible for supplying, maintaining, or completing:

Please find further details around these General Comments throughout this response document.

<p><b>Automated ticket issuance devices (real time handheld ticket issuance computers with photographic capability).</b></p>	<p>Comply. Please see Handheld Ticket Issuance Computers section on pg. 21.</p>
<p><b>Provision, operation, and maintenance of a web based automated ticket management system accessible via any computer, laptop or tablet with an internet connection. The proposer shall maintain redundant server systems to reduce the potential for an off-line communication failure between the proposer and the City of Stamford.</b></p>	<p>Comply.</p>
<p><b>Conversion of existing data (a minimum of 7 years back) to the new ticket management system 7 parking violations; overseeing methods of payment collections;</b></p>	<p>Comply. Passport is well versed at displacing other enforcement solutions and converting the City's existing data from over 7 years back. For instance, in New Haven, Passport displaced Duncan's enforcement solution and converted over 10 years of historical data into Passport's CMP solution, which included over 1 Million records.</p> <p>A preliminary export (dry run) is run on the data to be uploaded from the City's current systems into Passport's platform - this is a small sample size. This dry run is done to encompass the migrated information and ensure that it is functioning correctly prior to the full import being completed during the scheduled conversion. Existing citations are exported into reports and formatted to fit into the new system. During the full conversion, Passport imports all existing data from most to least recent until the full library of historical data has been imported. Through experience, Passport has refined the process for a smooth transition. The process is as follows:</p> <div style="display: flex; align-items: center;">  <div> <p><b>Transferred Files</b></p> <ul style="list-style-type: none"> <li>Legacy Permits</li> <li>Permit Payment Records</li> <li>Legacy Citations</li> <li>Citation Payment Records</li> <li>Citation Notes</li> <li>Multimedia Index Files (.csv)</li> <li>Boot and Tow Data</li> <li>Fleet Registration Data</li> </ul> </div> </div>





	<ul style="list-style-type: none"> <li>→ Passport fully reviews all data exported for custom fields and citation status that needs to be converted.</li> <li>→ Pending appeals will be reconciled in the new system;</li> <li>→ Passport will leverage the existing DMV lookup data, including holds, to ensure the most up-to-date system;</li> <li>→ All outstanding DMV requests will be converted into the Passport system; and</li> <li>→ Any leftover actionable tasks are completed in the existing system prior to transition to either be closed or cleanly imported into the new Passport system.</li> </ul>
<b>Data entry of ticket (manual) and disposition data.</b>	Comply.
<b>Information retrieval from the Department of Motor Vehicles (DMV), local and nationwide.</b>	Comply. Please see Department of Motor Vehicles (DMV) section on pg. 29.
<b>Automated fine escalation and late fee assessment.</b>	Comply.
<b>The generation and mailing of Late Notices for unpaid tickets.</b>	Comply.
<b>Placement and release of DMV registration suspensions/holds (when applicable).</b>	Comply. Please see Department of Motor Vehicles (DMV) section on pg. 29.
<b>Online inquiry and update.</b>	Comply.
<b>Provision of a Customer Service Call Center.</b>	Comply. Please see Customer Service section on pg. 31.
<b>Receipt and posting of mail payments.</b>	Comply.
<b>Creation of user accounts for recipients of the citations.</b>	Comply.
<b>Online cashiering.</b>	Comply.
<b>Internet payment capability.</b>	Comply.
<b>Interactive Voice Response (IVR) System.</b>	Comply.
<b>Ticket book inventory and control.</b>	Comply. Please note that Passport aims to reduce or even eliminate the need for reliance on paper ticket books.



<b>Court/Review Adjudication management and reporting.</b>	Comply.
<b>Management and statistical reporting for the issuing agencies and the Court.</b>	Comply.
<b>Automated Boot/Tow functionality and integration with the City's self-release booting contractor.</b>	Comply.
<b>Ad Hoc query and reporting.</b>	Comply.
<b>Complete ticket processing and collections activity audit trail.</b>	Comply.
<b>Follow up collection on delinquent parking tickets.</b>	Comply. Please see pg. 29 for more information on Passport's delinquent ticket collection process.
<b>Interfaces to other subsystems as required by the City during the course of the contract, such as the HTE software system. Proposers must list all other software their respective system can be and/or has been integrated with in past applications with other government agencies.</b>	<p>Passport is a leader in integrated technology software for parking. It utilizes an open API so that it can integrate with all other providers in the client's ecosystem, such as HTE.</p> <p>All data will be aggregated in OpsMan for easy retrieval by City administrators. During implementation, Passport will provide an API to pull data from other parking payment providers and historical data so that City administrators can manage all parking citations from within OpsMan. Passport has existing integrations with most leading providers of parking hardware and software, creating a truly seamless solution for parking management.</p> <p>In addition to integrations with other parking service software, Passport maintains several integrations to provide the best level of service to its clients. These integral integrations include the following:</p> <ul style="list-style-type: none"> <li>→ Nlets, which provides all DMV and scofflaw data directly to Passport's citation issuance software;</li> <li>→ Genetec, which provides LPR technology to improve the speed and efficiency of citation issuance.</li> </ul>
<b>Digital Imaging.</b>	Comply.
<b>On-line appeals – primary and escalation.</b>	Comply.



**The successful proposer must meet the following requirements:**

- 1. Provide a turnkey Web-based system capable of processing and collecting City regulated fines, fees and taxes for in-state and out-of-state vehicle owners with parking violations. The system must implement industry standard security and encryption for transactions. [Comply.](#) For more information, please see the Customer Service section on pg. 31.**
- 2. Maintain current and historical vehicle information that expedites the towing/booting or notification to officers of vehicles having received three (3) or more unpaid parking citations. Immediate and continued integration with the City's booting contractor is imperative. Values and parameters are subject to change. [Comply.](#)**
- 3. Provide on-line query and ad-hoc reporting access. The online query or ad-hoc reporting tool must directly access data in the master database to provide accurate real time information. [Comply.](#)**
- 4. Provide a variety of managerial reports. These will include the type and status of tickets, revenue collection data, exact number of unpaid tickets, etc. All reports must be exportable into a usable excel format. [Comply.](#)**
- 5. Proposer must provide a minimum of twelve (12) handheld issuance computers, twelve (12) lightweight thermal printers. During the term of the agreement the proposer will continue to provide the same proportional number of handhelds to staff if the number of staff increases. Proposer must also provide software, host PC, cables, chargers, batteries, ticket paper and envelopes etc. to operate the handhelds. The proposer must include a plan for future purchases and upgrades. [Comply.](#) Passport's Enforcement Kit includes a configured Zebra ZQ320 printer with charger, battery, one roll of paper, shoulder strap, Samsung Note 7 (Android), rugged phone case, phone charger and a phone screen protector, one year warranty. Please see pg. 21 for more information on Passports recommended handhelds. Fees for the purchase of the handhelds can be found on pg. 81**
- 6. The handheld host system must be capable of transferring all data and multimedia attachments, including digital voice recordings, video and photographs (in both day and night, a minimum of four (4) per ticket), captured by the handhelds. Proposers should also address the ongoing maintenance and replacement cost of the handheld devices. A detailed description of the equipment proposed and the associated benefit of the equipment proposed is required. [Comply.](#)**
- 7. The proposer shall implement and provide, free of charge, all necessary training and instruction on the proposer's system. Proposals should provide a description of the training sessions available during the pre-implementation, implementation, and ongoing support phases of the project. Proposer shall at a minimum supply an administrator on site for the first week of operation to provide onsite training and troubleshooting capabilities. Administrator shall be available for training of all officers on all shifts (7am - 12am). Additional training for City staff shall be made available online if needed. [Comply.](#)**
- 8. The ability to process credit card payments for parking ticket fees and fines. Ability to process IVR (integrated voice response) payments over the phone. The ability to process payments over the Internet. Proposers must meet all current PCI DSS multifaceted security standards that include requirements for security management, policies, procedures, network architecture, software design and other critical**



protective measures. Proposers are also responsible to update any standards immediately as they change or are updated. [Comply.](#)

9. **The ability to access real-time ticket information on-line and to pay the ticket on-line. Users shall be able to create an online account that saves information based on license plate(s) with notification ability on all citation activity.** [Comply.](#)
10. **Services shall provide for the timely collection of fines from parking violators whether they are currently located in-state or out-of-state.** [Comply.](#)
11. **The proposer shall identify and report necessary or beneficial policy and procedure changes. The City will have final decision on all changes made.** [Comply.](#) Passport will track all policy and procedure changes and will alert the City of any pending changes.
12. **The proposer shall develop an implementation plan and submit it for City approval within 30 days of notification of award and be prepared to start contract within ninety (90) days from written notice to proceed.** [Comply.](#) Passport is happy to provide its implementation to the City within 30 days of award. The average time it takes Passport to launch the solution is 70 days.
13. **All information pertaining to the issuance, processing and/or collection of parking tickets will be the sole property of the City of Stamford. The Proposer shall provide the City with a monthly reporting of parking ticket information sufficient to provide an electronic audit of all processes pertaining to parking ticket collection operations.** Operational Data is specific to the City's operations (i.e., fine and escalation information, operational schedules, business metrics, etc..) and is wholly owned by the City. For purposes of this contract, Passport asks for a perpetual, irrevocable, and non-exclusive license to use such data in its service of the platform for the City's benefit. With this information, Passport will provide the City a monthly report of parking ticket information to maintain all processes pertaining to parking ticket collection operations.
14. **Itemize the cost of the proposed services. Include projected costs for the initial contract years and renewable contract years. Proposers must quote the cost of their services based on price per ticket. The proposer must describe their plans to ensure the use of cost efficient methods for providing proposed service to the City. Secondary collections pricing shall be supplied separately and on a contingency basis.** [Comply.](#) Please see the costs on pg. 81.


Passport understands the City of Stamford Penalties and Collections process as follows:

If the ticket is not paid within 30 days of the violation, an additional penalty of \$25.00 will be added to the original fine.

If the ticket is not paid within 30 days of the original penalty, an additional penalty of \$25.00 will be added to the original fine and penalty.

After performing a DMV look-up for registered owner information, Passport will send the first letter after 30 days of ticket issuance (1st penalty added) and a second letter after 60 days of ticket issuance (2nd penalty added). As Passport is not an accredited debt collection agency, no outbound "hard" or "secondary" collections efforts will be made, unless otherwise requested by the City. If necessary, Passport partners with Linebarger Goggan Blair & Sampson, LLP Attorneys at Law to perform any necessary "secondary" collections, at the City's request.

**The proposer must provide the City with an initial three (3) year contract price with two (2) additional one-year renewable terms.** [Comply.](#)

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15. **The proposer must have the capability to integrate existing systems data with the system proposed.** *Comply.* Passport utilizes an open API so that it can integrate with all other providers in the client's ecosystem, including the City's existing provider.
  16. **Included with each proposer's submission shall supply a business plan and associated cost to attempt to recover the City of Stamford scofflaw backlog.** *Comply.* Passport offers a proprietary collection software called Harvester to aggregate legacy scofflaw (citations) and attempt to collect on them. During the transition to *Enforcement* by Passport, there will be a number of outstanding citations that will need to remain in the collection process. To facilitate this process, Passport uses its proprietary collection software: Harvester Citation Collection ("Harvester"). Harvester aggregates legacy citations and pulls the registered owner's address from the DMV and other vehicle registration data sources. These sources will skip trace the current address of a vehicle owner that received a citation in a different state with a different home address at a different point in time. Once the address is obtained, the system will automatically mail out a delinquency notice to the owner. If the citation is still unpaid, Harvester will continue sending notifications, in accordance with local ordinances, until the citation is paid, the delinquency requires state intervention, or Harvester determined the vehicle owner to be unreachable. This innovation allows the City to recover unpaid citations, prevent collection letters from being sent to the wrong person, and only share revenue for citations that are successfully collected. Using Harvester, cities have seen an 20%+ increase in collection of delinquent citations, which have otherwise been abandoned.
  17. **The proposer must be used with the Pay-by-Cell sub-contractor, currently Parkmobile.** *Comply.* Passport is a leader in integrated technology software for parking. Passport has existing integrations with many providers of parking hardware and software, including Parkmobile, such as New Haven, where Passport's Citation Management Platform ingests and displays transactions from both ParkMoible and "GoNewHaven" (powered by Passport) in real-time.. Passport offers its own best-in-class mobile payment application to the City of Stamford as a valued-added and fully-integrated option to further streamline the City's parking operations and the user's' parking experience.

## Specific Requirements


### *General*

**The System shall be web-based and accessible from all City desktop PCs, mobile and tablet devices and at any workstation in use by a user given privileges by the City. The system shall be compatible with all major internet browsers, including but not limited to Internet Explorer, Chrome, Firefox and Safari.** *Comply.*

**Proposer shall provide a system that is capable of uploading all parking ticket information from the proposed handhelds, including digital voice and video recordings and photographs.** *Comply.*

**Proposer shall provide data entry services to input, capture and process all manual (handwritten) tickets in a timely manner.** *Comply.* All handwritten tickets can be input and processed in OpsMan along with the digitally uploaded tickets.

**The Proposer will process tickets by mutually agreed upon means for all electronic and handwritten tickets on a daily basis (within one (1) working day of receipt of transmission from City of Stamford). Violations, deletions, holds, and dispositions shall be processed within one (1) working day as well; dispositions must provide rejection capability to avoid duplication of ticket numbers. Proposer shall image all manual tickets and make them available as part of the ticket processing system and individual ticket records.** *Comply.* All



tickets issued electronically will immediately be available in OpsMan. Any handwritten tickets will have to be input manually by City employees and will be available for review in OpsMan once input.

**Perform routine updates of tables and lists, file reorganizations, software upgrades, and equipment maintenance. The selected proposer must provide the most current upgrades at no cost to the city of Stamford, which will be included in the maintenance agreement.**

**Comply.** Passport is constantly updating its system and pushes system-wide updates as often as once per week. Prior to releasing an update, Passport will train all internal stakeholders (Product Support, Customer Support, Service Delivery, and Client Success Management) on how the nuances of the new feature, how to implement it, how to troubleshoot it, and how to direct users to use it. Once trained, the release will be pushed to all impacted clients. Along with the release, impacted clients will also receive an email explaining the new update.

**The System shall be capable of maintaining an accounting of all tickets by issuing officer, including missing and voided tickets, based on procedures established by the proposer and provided to the City. The System shall enable the City's authorized Parking staff to perform an on-line inquiry of active and voided tickets.** **Comply.** Every time an issuing officer is on duty, they will sign into OpsMan Mobile with unique credentials. Once logged in, every citation issued by that enforcement officer will have the officer's name, badge number, and signature auto-populated on each citation, reducing the number of steps required to issue a citation. The City's parking staff will be able to perform inquiries of active and online tickets.

**The System shall facilitate gathering information to report on the performance of ticket writers and the Traffic Violations Officers (TVOs) including reports that indicate gaps in issuance of tickets and issuance mapping on a per officer basis. Information shall be captured and recorded by the System from the time of ticket issuance through the time of final ticket disposition.** **Comply.** For more information on OpsMan Mobile and OpsMan capabilities, please see the description at the bottom of this page.

- **The proposed system must be able to run without requiring administrative permissions on the local PC.** **Comply.** Each administrator will have a login that will dictate what they have access to within OpsMan.
- **Service Level Agreements will be required for access and application up time based on industry best practices and standards.** **Comply.**
- **No aspect of the core software system may be dependent on a third party such that the City's access to the system or the security of the data will be compromised or otherwise put at risk.** **Comply.**
- **All data and services must be provided by facilities located within the United States. No offshore data storage or services are acceptable.** **Comply.** Passport's data and service are hosted in several locations across the United States.
- **All data provided to or created by the system will be the property of the (City) in that it may be requested of the vendor in the form of an extract or download in a format that is usable by the (City).** **Comply.**
- **Any subcontracting or partnership agreements that directly relate to the proposed system must be clearly stated in the proposal. The City reserves the right to refuse subcontracting.** **Comply.** Passport will be partnering with CheckAlt to provide Lockbox services to the City. Additionally, Passport is able to pull in any other company needed to provide all requested pieces in this RFP as necessary. For more information on Passport's open API, please see pg. 12.
- **The proposal must clearly state any ancillary costs associated with the system such as hosting fees, supporting technologies such as database platforms or similar services required for the full functionality of the system.** **Comply.** Please see pg. 81 for Passports cost proposal.



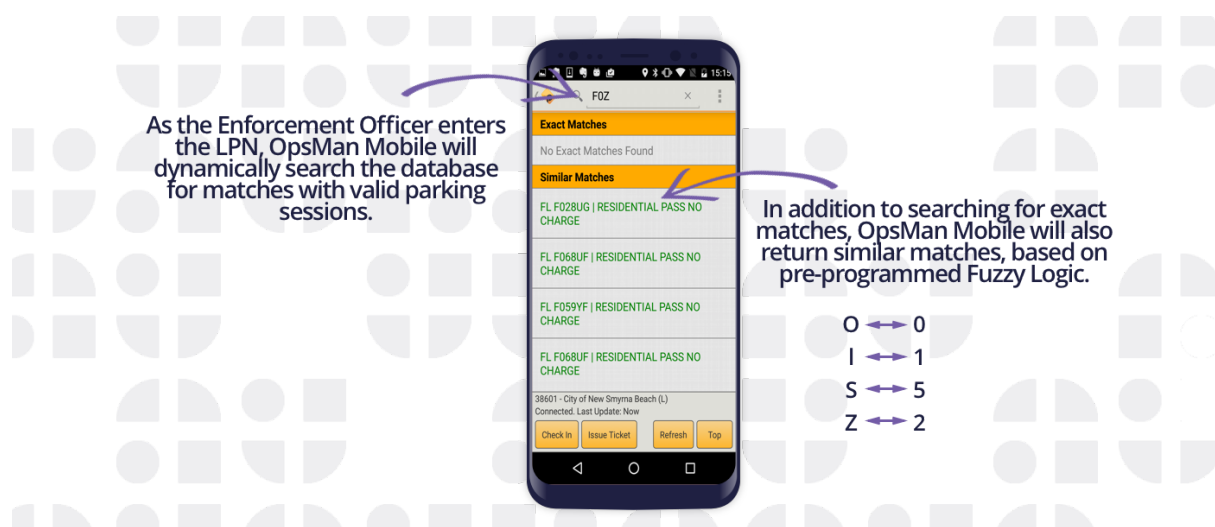


- **In the case of a system that is hosted by the vendor, the vendor must provide documentation of industry standard data center maintenance, backup and disaster recovery methodologies consistent with a Tier 3 data center as outlined by the Uptime Institute Data Center Topology Comply.** Please see pg X for Passports Disaster Recovery Plan. Additionally, Passport adheres to standard data center maintenance and can provide additional information on this topic to the City by request.
- **The proposed solution should assume data migration from the existing environment will be required. The extent of historical data to be migrated will be agreed to upon as part of the project deliverables Comply.** For more information about Passport's Harvester program please see pg. 15.

### OpsMan Mobile

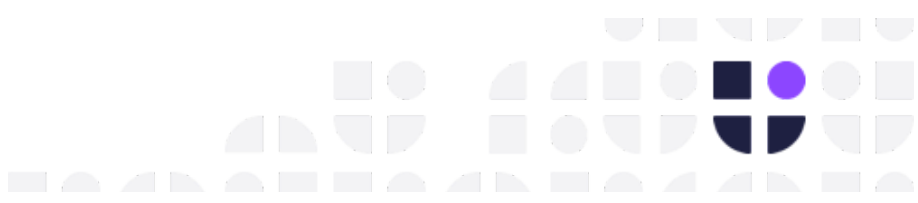
Once the system has been built by Passport's Service Delivery team, the City's parking enforcement officers will be provided with a unique username and password to access OpsMan Mobile. Once logged in for the first time, the enforcement officers will then update their passwords, which can be reset at any time by the City's main administrator or by Passport. Each time the enforcement officer is on duty, they will sign into OpsMan Mobile with these unique credentials. Once logged in, every citation issued by that enforcement officer will have the officer's name, badge number, and signature auto-populated on each citation, reducing the number of steps required to issue a citation.

From the main screen, the enforcement officer will walk their regular beat, entering in the LPN of each vehicle in the zone. Each LPN is checked against the master database of all valid parking sessions, which Passport pulls from meter, pay station, and mobile payment providers in real-time.<sup>2</sup> Passport utilizes dynamic lookups within its system, which check each character against the database, eliminating all valid sessions that don't contain the same array. To account for human error, Passport also uses Fuzzy Matching when an officer enters the LPN. Fuzzy Matching uses character replacement to show exact LPN matches and also matches where the character has been replaced. For instance, if the LPN is "OAZ L5Z" and the enforcement officer mistakenly types an "O" instead of "0," Passport's Fuzzy Matching system will account for this common mistake and return all LPNs with an active session that begin either "OAZ" or "0AZ." The Fuzzy Matching system accounts for common mistakes when using O and 0; I and 1; S and 5; and Z and 2.



If the LPN does not match any valid sessions within Passport's database, the enforcement officer will be prompted to issue a citation. When the officer is on the correct page, Passport will again check the database to see if the LPN is associated with a known scofflaw. At the bottom of the first screen, OpsMan Mobile will display the number of unpaid citations associated with the LPN, which may impact the fine amount or the type of citation issued, depending on City rules and regulations.

<sup>2</sup> Where possible given the provider's ability to send such data.



When issuing a citation, the LPN will be populated based on the officer's previous search. The state of registration will be automatically populated as the state of issuance, but can easily be changed using a drop down menu. The officer will then enter the other required fields, which will be configured to the City during implementation. Passport maintains options for almost all possible data points, but has also allowed for the City to add custom fields, if needed. Once all fields have been filled out, Passport will automatically double check the LPN against the database of valid sessions to ensure there was no payment, then enforcement officer will be required to confirm the citation and either select "Print," "Update," "Reissue," or "Void," as appropriate.

In zones that allow free parking for a set period of time, enforcement officers can use OpsMan Mobile to electronically chalk each vehicle and receive updates about timing. To electronically chalk a vehicle, the enforcement officer will select "Chalking," then enter the LPN, the cross streets<sup>3</sup>, and a time limit for the vehicle. This data will be stored in the cloud and accessible by any officer, so if another enforcement officer comes across the same vehicle and enters the LPN, they will see that it was chalked 35 minutes ago, for example, in a 30 minute free zone. That second officer will be prompted to issue a ticket for that vehicle. If a citation is required, the chalking information will also be printed on the issued citation, strengthening the City's argument on appeal.

If the enforcement officer does not have access to the internet while walking their route, they will still be able to issue and print citations. Once the officer regains a connection to the internet, all issued citations will be batch uploaded to the cloud and be accessible on OpsMan. Even if the citations were not uploaded when the violator received the citation and would like to pay immediately, they will be able to do so using Skeleton Citations (see *supra*).

OpsMan

## Reports

The Reports tab allows the administrator to run predefined, ad hoc, and custom reports on the data collected by Passport Enforcement. Passport Enforcement aggregates all data related to the issuance, processing, adjudication, and collection of citations and available integrations within the City's parking operations. OpsMan comes preloaded with financial, ticketing, and administrative reports, though all reports and raw data may be exported to Excel for further analysis.

Using the Reports tab, the administrator will be able to select a predefined report, such as Daily Citation Payments. Using filters, the administrator will select the zone or zones as well as the relevant dates. After clicking "Submit" OpsMan will return a report with a line-item summary at the top and a bar graph below. The summary will tally up the total Number of Citation Payments, Citation Payment Revenue, and Average Payment Amount for the time period selected. The bar graph will show the daily revenue collected. By hovering over a particular bar within the graph, a popup box will show the total revenue and number of transactions for that day. When downloaded to Excel, this report breaks down the data in the initial summary by day for further analysis.

Passport's most popular report for Passport Enforcement is its Ticket Density report. This report returns a heat map of citations issued. Each report can be filtered by the zone and dates as well as specific times, officers, citation types, and status of the citation (paid, unpaid, partially paid, voided, or accepted appeal). On the returned report, the color spectrum goes from a light green to a deep red, depicting least dense to most dense. Combining this report with the officer routing report can be used to adjust each officer's route to either increase compliance with parking regulations or increase revenue, depending on the City's goals.

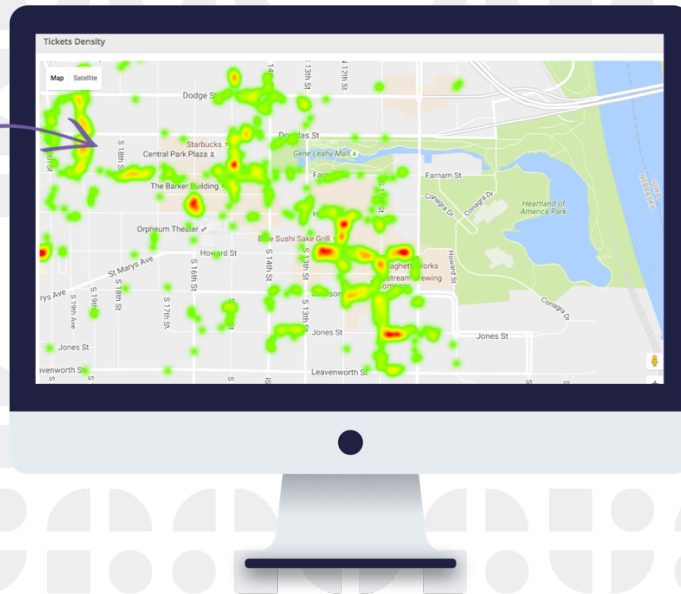
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<sup>3</sup> Chalking can be based on either cross streets, a specific address, or the entire zone.





Heat map of citation density in area



Filter By:

- Zone
- Date
- Time
- Officer
- Citation Type
- Status of Citation: Paid / Unpaid

Passport is constantly iterating and updating its products, including the reporting functions in OpsMan. If the City requires a report that is not already created, Passport will work with the City to develop that report and, if it provides utility to other clients, will make the report available to other clients. Similarly, if other clients request a report with high utility, it will be made available to the City through regular updates.

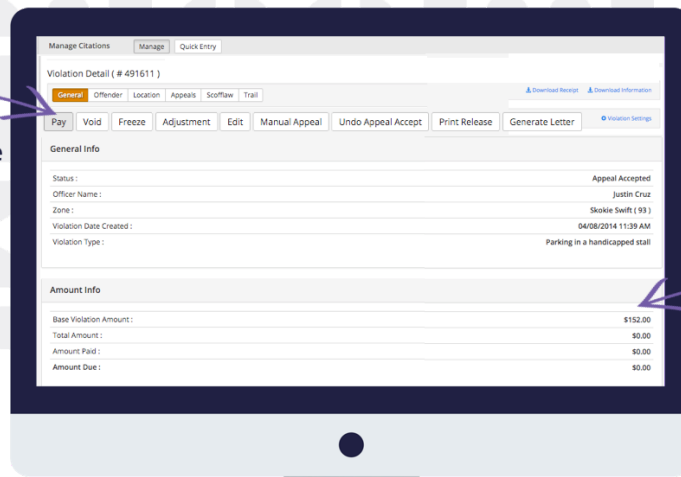
## Ticketing

From the "Ticketing" tab, the administrator will be able to manage the entire citation management program. By clicking on "Ticketing" there will be a drop down menu with options including "Write a Citation," "Manage Citation," "Void Queue," "Violation Types," "Settings," and "Appeals." Write a Citation allows an administrator to write a citation without downloading OpsMan Mobile. This is most often used by police officers who don't usually enforce parking regulations, but needs to write a citation and print it from their in-car printer.

"Manage Citation" allows the City to lookup specific citations or a group of citations issued by a specific officer and see a complete file on each citation. By clicking on a specific citation, the administrator will see the general information about the citation (where it was issued, by whom, total fine amount, total paid, LPN, vehicle make and type) as well as all associated pictures. This detailed view will also return information about the offender, including last known address, the exact location where the citation was issued, any appeals, whether the LPN is eligible to be classified as a scofflaw, and a full audit train related to that citation.



Pay, Void, Freeze, Adjust, Edit, or Manage Appeals directly from OpsMan



Track escalation schedules, including automatic fine increases

The “Void Queue” will return a full list of all citations that were voided after issuance. “Violation Type” allows the administrator to add, edit, or delete types of citations and their associated fines. From the “Settings” drop down menu, the City will be able to make adjustments to the overall system, including to Citations, Chalking, Street Names, Common Notes, Void Types, Common Appeal Responses, and Custom Fields.

The “Appeals” drop down menu will give the City increased control over the adjudication of parking citations. Process Appeals returns a list of all citations that have been appealed through RMCPay, the appeal reason, the appeal date, and a description of the action. By clicking on an individual appeal, the administrator will be able to view the full citation detail and respond to the appeal. The administrator can accept or decline the appeal or adjust the fine amount. To streamline this process, OpsMan has a drop down list of Common Appeal Responses. Once the response is selected or written the administrator may attach any supporting attachments and change the status of the appeal. Each action will be stored with the citation for future use and reporting by the City.

The Appeal Follow Up selection, allows administrators to respond to appeals that were received through other channels, including emails. Processed Appeals returns a complete list of all of the appealed citations that have already been processed. Process Hearing Requests allows the City adjudicator to see which appeals have requested hearings for tracking and scheduling.

## Users

Clicking on “Users” will return a drop down menu with “Roles” and “Users.” “Users” is only accessible to a Main Administrator and will be used to create a user, edit access to OpsMan, reset a password, or delete an account. The Main Administrator can filter based on the Role or search for an individual administrator.

The “Roles” page allows the Main Administrator to change OpsMan access for an entire role. During implementation and thereafter in account creation, the Main Administrator will assign a role to each user. Based on those roles, the Main Administrators can set access controls. Commonly defined roles include “Accounting” and “Customer Support.”

## Scofflaw

Clicking "Scofflaw" returns a drop down menu of Boot and Tow and Export Scofflaw. Export Scofflaw allows the City to quickly export a complete list of all Scofflaw offenders in either CSV, Excel, or LPR format. Boot and Tow allows administrators to search Scofflaws by name, LPN, Boot/Tow cross streets, make and model, or Boot/Two number. This will return the Scofflaw's name, LPN, make and model, total outstanding fine, and the total number of citations associated with that violator. By clicking on an individual violator's name, the administrator will see a complete list of all outstanding citations, update the status to Towed, Boot or Tow, Impounded, Disposed, Released, and Outstanding. To assist this program, Passport recommends giving limited administrative access to OpsMan to boot and tow companies, allowing them to see which vehicles need to be booted or towed, where they are, and updating when the vehicle has been released.

## Handheld Ticket Issuance Computers

- **A lightweight mobile handheld with separate. Total weight taken into account shall include computer, printer, battery pack and 75 tickets** [Comply.](#)
- **Memory capacity of 1,000 tickets before unloading** [Comply.](#)
- **Battery capacity to operate uninterrupted through an eight hour shift per charge and full recharge in 4-8 hours, easy use for multiple shifts** [Comply.](#)
- **Full 55 key alpha-numeric keyboard with no need to shift between alpha and numeric with a function key (26 alpha, 14 numeric/punctuation, 5 function and 10 cursor/edit control) or 60 keys (26 alpha, 16 numeric/punctuation, 6 function 12 cursor/edit control)** [Comply.](#)
- **"Hotlist" storage for 75,000 – 1,000,000+ plates** [Comply.](#)
- **Storage of complete make, color, or body type lists** [Comply.](#)
- **1,000+ violations and a complete states list** [Comply.](#)
- **1,000+ remarks of 32 characters in length** [Comply.](#)
- **1,000+ streets or locations of 24 characters each** [Comply.](#)
- **Ticket issuance every 25 to 30 seconds** [Comply.](#)
- **Complete password protection system for the PC Host System** [Comply.](#)
- **Durable and weather proof for use in rain and snow conditions.** [Comply.](#)
- **Concurrent printing and top of form sensor mark** [Comply.](#)
- **Second power down mode to conserve energy** [Comply.](#)
- **GPS equipped for beat monitoring and ticket reporting** [Comply.](#)
- **Full integration with Parkmobile APP and other pay by cell providers** [Comply.](#)
- **Ability to take and attach pictures with the citations** [Comply.](#)
- **Handhelds must have store and forward capability to ensure operation if internet connectivity is lost.** [Comply.](#)

Passport highly recommends the use of Samsung Galaxy Note 7 and up or the Samsung Galaxy S suite of products, S4 and up, to ensure seamless functionality while enforcing in the field. The Galaxy Note 7 is an Android smartphone with glass front and back panels in an aluminum frame with a curved 5.7" Super AMOLED (active-matrix organic light-emitting diode) display with Quad HR resolution. This display gives the phone a higher refresh rate and reduces the response time to less than a millisecond, while also consuming less power. The Samsung Note series has a better battery life than most smartphones due to its larger size. The Note 7 has a 3,500mAh non-removable battery with fast-charging capabilities.



The camera on the Note 7 has a 12MP dual-pixel sensor with optical image stabilisation and an f/1.7 aperture. The camera on the S7 is one of the best available on the market currently. Additionally, the Note 7 has a 5MP front camera sensor, also with an f/1.7 aperture. This high quality camera will make it much easier for parking enforcement officers to take multiple

pictures of each vehicle, which can be stored with the citation on OpsMan and/or printed directly onto the citation.

In order to print the citations, Passport recommends the use of Zebra's ZQ320 Bluetooth printer. Zebra's ZQ300 series of mobile printers have class-leading battery power, durability, and easy remote management. The outside-four-walls model of the printer is designed to handle the elements, generate high quality citations, and guarantee power for the longest shift in the field. Zebra's patented technology reduces battery power consumption by calculating and delivering the exact amount of power required to provide the highest quality printing. The ZQ320's print speed is adjusted dynamically in real time, based on multiple factors (motor torque, battery and print head temperature to print density, battery age, available voltage, etc.) to consume the exact amount of energy needed. This technology reduces the ZQ320's power consumption by 20-30% per battery cycle. When the battery does need to be recharged, Zebra offers a rack-based backroom charging station that can accommodate all of the City's devices at once. Additionally, printers can be charged using an AC-to-USB power adapter. All warranty services will be provided by the handheld providers.



<b>Dimensions</b>	H: 130 mm W: 117.7 mm D: 49.5 mm
<b>Weight</b>	0.43 kg.
<b>IP Rating</b>	IP54
<b>Battery</b>	2,280 mAh Lithium Ion Battery
<b>Operating temperature</b>	-15 to 50 degrees celsius
<b>Charging Temperature</b>	0-40 degrees celsius
<b>Humidity</b>	10-90% non-condensing
<b>Print Speed</b>	100mm/second
<b>Print Width</b>	72mm
<b>Paper Roll Outer</b>	40mm

Diameter

Printing Method

Direct Thermal

Print Resolution

203 dpi

**Samsung Galaxy Note 7<sup>4</sup>**

Touch Screen

Multi touch capacitive  
Waterproof  
IP68 Rating

Front Camera

5MP

Rear Camera

12MP  
Optical Image Stabilizer  
Pro Mode  
LED Flash  
Dual Pixel Technology

**Standard Modules Must include:**

- **Parking module**
  - **Ticket Issuance & Look Up feature** [Comply.](#)
  - **Search Only Mode (Plates) feature** [Comply.](#)
  - **Warning Issuance feature** [Comply.](#)
  - **Up to 3 late fees feature** [Comply.](#)
  - **Special Enforcement/Scofflaw Hot List feature (plate)** [Comply.](#)
  - **IVR Code feature** [Comply.](#)
  - **Check Digit on the Ticket # (MOD 7 Service Center Standard)** [Comply.](#)
- **Time Limit Marking function (Mark Mode)** [Comply.](#)
- **Barcode Printing function (128c - Prefix & Ticket Number)** [Comply.](#)
- **Permit /License Cross Reference function** [Comply.](#)
- **Search Only Mode (permit) feature** [Comply.](#)
- **Meter/Location Matrix** [Comply.](#)
- **Broken Meter Reporting function** [Comply.](#)
- **Damaged Sign reporting function** [Comply.](#)
- **Officer Activity Logging function** [Comply.](#)
- **Visitor Information function** [Comply.](#)
- **OCR Scanline (Prefix/Ticket# and Fine)** [Comply.](#)
- **Warnings Tracking** [Comply.](#)
- **Manual Ticket Entry per form** [Comply.](#)
- **License Plate Inventory** [Comply.](#)
- **License Plate Recognition compatibility** [Comply.](#) To enhance the enforcement experience, Passport has partnered with PCS Mobile to offer an integration with Genetec's License Plate Recognition (LPR) system, both fixed and mobile. Passport works with Genetec's equipment in several other locations including Delray Beach, FL; Salt Lake City, UT; and Detroit, MI.

For more information on OpsMan Mobile capabilities, please see pg. 17.

## *Payment Processing*

**Proposer shall provide to the City a mechanism for payment processing that include:**

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<sup>4</sup> OpsMan Mobile can run on any Android device with 4.4OS or higher, but Passport recommends Samsung Galaxy Note products.

**1. Proposer shall provide equipment for no fewer than six (6) cashiering stations at the City's office. This shall include at minimum and not limited to a PC, monitor, barcode scanner and three (3) printers with color cartridges.**

<b>Type of equipment:</b>	Touch Screen Computer
<b>Used for:</b>	General Use/Cashiering Station
<b>Description of Technical Specifications:</b>	Windows, 23" Monitor, Landscape/Portrait Display, WiFi and NFC support, Energy Star Qualified, Intel® 4th Generation Core™ i7 Processors
<b>Manufacturer:</b>	HP
<b>Model:</b>	EliteOne 800 All-in-One

<b>Type of equipment:</b>	Barcode Scanner
<b>Used for:</b>	General Use/Cashiering Station
<b>Description of Technical Specifications:</b>	Linear Imager Barcode Scanner, Scan Speed: 270 scan lines/second, Reading depth of field: 0.5" to 26" USB, RS232, Keyboard Wedge, and IBM 46xx interfaces, Withstands multiple 5' drops to concrete
<b>Manufacturer:</b>	Honeywell
<b>Model:</b>	Two Options

<b>Type of equipment:</b>	Printer
<b>Used for:</b>	Scanning/Imaging, Correspondence Printing
<b>Description of Technical Specifications:</b>	Number of users: 10–25 users, Black-and-white prints at up to 52 ppm, Color Printing, Airprint, Security features: Protect sensitive data with a variety of security features.
<b>Manufacturer:</b>	HP
<b>Model:</b>	M604, M553, M252DW, M201DW, Scanjet Pro 3000

**2. Collection of parking ticket remittances received via mail at City of Stamford Post Office box(s) daily, except Sunday's and holidays when the U.S. Postal Service is closed. A Stamford address would be preferred but is not required.**

For Collection of parking ticket remittances received via mail, Passport will utilize its subcontractor CheckALT (Klik Technologies). CheckALT is committed to daily pick-ups (Monday - Friday, not Saturday, Sunday or Holiday) of mailed check payments, along with data entry, processing at reporting. CheckALT already maintains a PO box at the Stamford Post Office. Daily pick-ups from the Stamford Post Office will be taken to the CheckALT's



main processing center in Valley Cottage, NY. See Appendix for additional information regarding CheckALT.

**3. Daily sort and batch all City of Stamford's incoming mail by postmark date and post daily all mail from designated Post Office box(s) and other receiving sites.**

**Comply.** CheckALT will sort incoming mail by postmark to the best of its ability, citing the postmark date is often faded or illegible. CheckALT will provide digital imaging for receipt of the mailing it processes.

**4. Enter and process payments received within one (1) business day, including opening all mail received, verifying payment amounts, updating database/computer records, and making daily bank deposits. Comply.**

**5. Report to City of Stamford of bank deposits with ticket payment detail on daily basis. Comply.**

**6. Proposer must track, report and log rebilling on partial payments, checks returned for insufficient funds, vehicle change of ownership, and leased vehicle information. Comply.**

**7. Proposers shall propose a process for the collection of tickets from lessees or vehicle renters, which are returned to collecting agency by registered owner claiming lessee/rental as a defense against violation within a timeframe to be negotiated with the City of Stamford. Comply.** For leased and rented vehicles, Passport will follow a similar process to that of the City of New Haven, unless otherwise directed by the City of Stamford. Passport will work alongside the City to implement a process that follows the City's business rules.

**8. Proposer shall propose a follow-up process for the collection of those delinquent violations issued to out-of-state and in-state licensed vehicles, which do not pay the fines and are designated as delinquent subject to negotiation with the City of Stamford. Comply.** Passport will utilize NLETS to perform DMV lookups across all 50 states, in addition to a direct integration with The State of CT DMV. Unpaid ticket fees shall escalate in accordance with the City's escalation schedule, as will the mailing delinquent notices. Passport will aim to capture all payments in full, but its OpsMan back office will also allow for a "short pay" or negotiated amount, at the City's discretion.

**9. Proposer shall propose a Collection Process as DMV purges holds from their files or as holds are rejected because of transfers or make mismatches. Comply.**

**10. The System shall accept ticket dispositions and payments on-line and this information should be posted in real time. The Proposer shall provide equipment and staff to process mail-in payments, as well as receive, research and answer telephone and written inquiries from the public. The System shall provide various access and approval levels necessary to protect information. Comply.** When an officer issues a citation, it will be uploaded in real time into the backend system. The citation will also be available in real time to the violator in the payment webportal, RMCPay, so that the violator can pay or dispute the citation. All payments made through RMCPay will be updated in OpsMan in real time. The City will have complete control over who may access the backend system and to what extent each administrator will have access to the backend system. The levels of administrative access will be established during implementation. CheckAlt will provide the City will all equipment and staff necessary to process mail-in payments, as well as receive, research and respond to inquiries from the public.





**11. The System shall also have the capability of updating a payment or disposition before posting the original ticket. *Comply.***

**12. Include no name and mail hold status reports on a monthly or as needed basis along with course(s) of action to obtain the required information for proper billing and collections. *Comply.***

**13. The Proposer shall make available to users of the system to create an account based off of person or plate that will store information such as plate, address and contact information. *Comply.*** Passport’s “OpsMan” back office tracks all violator information based on License Plate Number, including: scofflaw, violation history, citation escalation history, permit history, payment history, appeal history, trail of notices sent, and more. Passport’s system does not support the ability for users to create accounts based on a person’s name, although registered owner information will be tied to a LPN’s history if and when a DMV lookup is performed, regardless of state.

**14. As an option, the proposer must provide a solution for a self-service payment kiosk for the payment of parking citations and/or purchase or permits. The kiosks must have a real time connection to the ticket processing and permit database. The kiosk will be stand alone and not require City personnel involvement to complete a transaction. The kiosks must have a touch screen and be bi-lingual (Spanish). The following payment types must be accepted: Cash, Credit card, and Debit Card. Change must be dispensed and the unit must be highly durable and be of sound construction. The City will be responsible for the maintenance and stocking of consumables for the kiosk. A complete breakdown of pricing for this unit shall be provided including anticipated annual consumable costs.**


*Comply.* Similar to the City of New Haven, Passport recommends a self-service computer station (PC or mounted tablet) that accepts credit and debit card payments. With basic instructions to assist the user during the self-payment process, the user will become accustomed to the process and habit of paying through RMCPay (online) for future violations received.

<b>Type of equipment:</b>	Touch Screen Computer
<b>Used for:</b>	General Use/Cashiering Station
<b>Description of Technical Specifications:</b>	Windows, 23" Monitor, Landscape/Portrait Display, WiFi and NFC support, Energy Star Qualified, Intel® 4th Generation Core™ i7 Processors
<b>Manufacturer:</b>	HP
<b>Model:</b>	EliteOne 800 All-in-One

### *Database and Data Access/Retrieval*

**Proposer shall provide the City of Stamford with on-line, real-time access to proposer’s database on a 24/7 basis 365 days per year. Any required system maintenance shall be performed after 12:00 PM and before 7:00 AM. *Comply.*** The City will be able to access Passport’s backend system, OpsMan, on a 24/7 basis 365 days per year. Any system maintenance will be scheduled at 3:30 AM to prevent any interruptions to the City.





**The System shall process all manually and electronically produced tickets. Electronic ticket data shall be available on-line within 24 hours of date of issuance. Manual ticket data shall be available on-line within 24 hours of receipt by Proposer. Comply.** All electronic ticket data will be available to the City in real time. The City will be required to input any hand written tickets into OpsMan. Once input, the information will be available throughout the system.

**The City of Stamford shall have connections through the internet for access at any location. The system shall be web based and use restriction shall be monitored through account privileges. Comply.** OpsMan is a web-based backend system, so citations to be accessed immediately from any web browser.

**The on-line inquiry system must provide the City of Stamford with real-time access through Ticket Number, Vehicle License Number, and/or Registered Owner Name or Address to all ticket information including registered owner name, address, license number, ticket number, make and model, payment information and history, and any administrative adjudication correspondence history. The system shall be capable of saving all information into a user account. Comply.** Within OpsMan, the City will be able to search in real time for individuals based on Ticket Number, Vehicle License Number, and/or Registered Owner Name or Address. With this search, the City will be able to access all related information, including vehicle details, account details, payment information and history, and any administrative adjudication correspondence. All of this information can be saved into a user account.

**The proposer will be required to install and maintain a Development Instance of the database. This instance will run in parallel to the production environment. The development environment will be a 'snapshot' of the production environment and mirror the features and functionality of the production environment. The City will have access to the development environment. The Development environment will be utilized by the City and proposer personnel for testing, validation of new features, functionality and training of new personnel. Comply.** We call this environment "staging", which is an exact replica of production from a data perspective, but has new features and functionality installed. The data is cleansed (from a PII perspective) with passwords reset, to provide an appropriate test bed for features and functionality prior to release into production.

**Proposer shall provide an Integrated Voice Response (IVR) System and an Internet Payment (IPAY) service capability for ticket inquiry and credit card payment processing. Comply.** For more information on Passports IVR system, please see pg. 33.

**As the City is currently evaluating exactly how many seat licenses will be required for this system, each proposer shall list the cost of each seat license on a per unit basis and identify and reduction in pricing based on volume. The City will also need an unlimited number of user accounts for access to the system. Comply.** Passport does not place limits on "seat licenses" for the backend system. All related pricing information can be found on pg. 81.

### *Lockbox Cash Management*

Passport has reviewed and complies with the requirements listed below. Passport enlists CheckALT (Klik Technologies) as a subcontractor for Lockbox Cash Management.

CheckAlt-Klik has been specializing in providing outsourced integrated receivables solutions to Financial Institutions (FI's), Businesses and Corporations across the US since 1998. CheckAlt-Klik processes in excess of 170 million transactions annually across 14 processing sites nationally including New York, Atlanta, Boston, Dallas, Denver, Detroit, Houston, Kansas City, Las Vegas, Los Angeles, Miami, Tampa, Phoenix, and San Francisco.



In addition to the FI relationships, CheckAlt-Klik serves a diverse set of industry vertical markets including the processing of parking citations, property taxes, school taxes, and water and sewer payments for municipalities across the country. CheckAlt-Klik has strong experience and expertise in providing effective solutions for these markets on behalf of Banks across the country. Additionally, we are both Bank and software independent allowing us to deposit into any Bank and integrate into any software system.

Passport and CheckALT will work alongside the City to implement the optimal process to support the City's business rules regarding Lockbox processing and reporting.

**Payments will be processed by proposer lockbox cash management staff and then deposited into a Trust Account established with the Proposer's Bank in the name of the Proposer and the City of Stamford. All activity within the Trust Account will be restricted to transactions for the City of Stamford. The Proposer will act as the owner of the Trust Account and have signatory control over the Trust Account. This Trust Account will be regulated by the State of Connecticut and the any other State or Federal agencies that governs financial institutions. A full accounting will be made to the City of Stamford at the end of each month. Records of deposits, management reports and statistical summaries of activity for the period, together with supporting detail, will be delivered according to the specific requirements of the City of Stamford. Comply.** Passport's subcontractor CheckALT has the ability to route lockbox funds directly into the City's Bank of America account, which would alleviate the additional step of utilizing a Trust Account. If necessary, the Trust Account method can also be supported. The City will receive a Posting File (for data entry into Passport's "OpsMan" back office) and a separate Deposit File (for bank account deposits) for daily batches of lockbox violations and payments.

**The Proposer should provide a detailed description of how the items received in the lockbox will be processed from the point at which the mail is sorted and opened to when the payments are then sent to the data entry for key-entry and batch assignment. Comply.**


**The bank account will be a Trust Account in the names of the proposer and the City of Stamford. The Proposer will be responsible for the reconciliation of the Trust Account prior to disbursement of funds to the City. The revenue will be transferred to the City by the 15th day of the following month. Proposer will issue a check to the City from the Trust Account. Comply.**

**Compensating balances normally offsets bank-processing charges. If the balances are not sufficient to offset the charges, those charges will be deducted from the amount due the City. In addition, return deposit items, citizen refunds, deposit adjustments and other bank adjustments will be deducted from or added to, the amount due to the City. Comply.**

**Proposer will prepare and send letters to the issuers of NSF checks to inform such issuers of the returned check and to provide notification that a \$50.00 NSF penalty charge has been added to the total ticket, payment is due and that payments must be made by cash, cashier's check or money order. In these cases, the City will receive the original penalty amount and proposer will be entitled to the NSF fee collected. A full accounting reconciliation for this NSF account will be prepared by proposer each month and submitted to the City of Stamford. Proposer will be liable and responsible for collection shortages, which may occur during the collection and processing. Comply.**

### *Penalty Process*

**Proposer will provide a system for Penalty/Late Fee processing that will include updating ticket information with penalty/late fee amounts owed. Penalties and or late fees are to be added to ticket information within one (1) working day of the ticket becoming delinquent. Comply.** While the City is managing its parking operations from OpsMan, the system will be diligently



working behind the scenes. OpsMan will automatically escalate fines according to the City's escalation schedules and mail out delinquency notifications on the appropriate dates. As citations approach an escalation milestone day, OpsMan will generate a delinquency notification from a preset template and mail the letter to the violator to arrive on the date of escalation. The City can customize as many letter templates as necessary to meet the escalation schedule. Each letter is triggered by different dates and will automatically adjust each fine. Passport maintains an integration with every state DMV through NLETS, which allows it to find the address on file for each registered vehicle owner, regardless of the state. OpsMan will continue to mail notifications until payment is made or state rules dictate that additional intervention is required.

### *Department of Motor Vehicles (DMV)*

**Proposer must interface with local DMV to obtain registered owner information. At least two (2) documented attempts must be made to obtain this information. When the ticket becomes delinquent pursuant to City of Stamford ordinance, the registered owner name shall be on file and available for the automatic generation of a Delinquent Notice. Comply.** Passport has several CMP installations within Connecticut, including New Haven and LAZ Parking, and therefore already has an integration with the Connecticut DMV in place for registration hold additions and removals.

**Proposer must have ability to retrieve data on-line from the State DMV and access registered owner information, validate DMV makes upon return of DMV information to ensure proper make of vehicle issued ticket and DMV payment information. Comply.** Upon issuance of a citation, Passport will utilize its integration with the Connecticut DMV to pull registered owner information, ensuring proper make of vehicle issued ticket and DMV payment information.


**Proposer must have the ability to retrieve registered owner information from all 50 US States, the District of Columbia, and Canadian Provinces (where legal). It is recommended that the proposer maintain a license with the National Law Enforcement Telecommunications System (NLETS) to overcome any obstacle in retrieving owner information. Proposers must clearly indicate if they maintain this license. Comply.** Passport maintains an integration with NLETS in order to access registered owner information from all 50 US States, the District of Columbia, and Canadian Provinces (where legal). Using NLETS, Passport will be able to pull registered owner information as needed by the City.

**A DMV Hold Notice (where applicable) shall be transmitted to the DMV on all vehicle registered owners who have not complied with the Notice of Intent. An edit check shall be made to correct any discrepancies. A DMV hold will be placed on the registration for those vehicles for which no response to the notice was made within five (5) days of the time allowed by law. Comply.** Passport automates the DMV hold process through the City's OpsMan interface. An integration has been established with the Connecticut DMV for the seamless placement and release of DMV holds. An edit check shall be completed when necessary to ensure there are no discrepancies.

**A Release of DMV Hold (where applicable) shall be transmitted to DMV if payment of a ticket previously submitted to DMV for Hold is received by the Proposer. Comply.** Passport will work with the City and other state's DMV registries to place and release registration holds where applicable.

### *Delinquent and Late Notice Generation and Mailing*

**The Proposer must provide ticket collection services to the City, as well as generate and mail all notices. Notices must be generated within a period specified by the City of Stamford. The Proposer shall follow best practices procedures and any and all State Statutes and regulations. Comply.** Passport will work with the City to customize notification letters based on the specifications of the City, which will be mailed to the violators at set intervals of time. The City can



create a different letter for each level of delinquency, with the fine amount increasing accordingly. Taking data from RMCPay, OpsMan will automatically generate these letters and send the notifications to each violator.

**For all notices, all outstanding parking tickets for the specific plate and person(s) must be included. All unpaid motor vehicles taxes for each respective vehicle may be added at a later date; currently Stamford does not practice this.** **Comply.** Passport will include all information requested by the City on the notices.

**Proposer will be responsible to program all required fine and penalty escalation logic in accordance with Stamford specifications. All notice language will be programmed in accordance with Stamford specifications for the various types of notices.** **Comply.** Passport will use the City's current escalation schedule to create proper fine amounts on notices. All notice language will match the City's specifications for the various types of notices.

**The following data will be included on the Stamford notices:**

- a. Registered owner name and address
- b. Vehicle license number
- c. Vehicle make
- d. Parking violation issue date, number, and time
- e. Location where parking violation was issued
- f. Issuing agency
- g. Violation and description
- h. Information on how and where to make payment
- i. Total amount of payment for listed tickets
- j. Consequences of non-payment (tow/boot, penalties and DMV hold)
- k. Contact information including toll free telephone number and website address
- l. Motor vehicles taxes due for the plate holder on all vehicles (not currently)
- m. Other (capability to add additional data at a later date)

**Comply.** Passport will work with the City to include all requested information in the notices sent to violators.

**In conjunction with the generation of Notices, a Notice Register will be generated listing, by state/plate, all tickets for which a notice is prepared. Information contained on the notice register will reflect the information contained on the notice.** **Comply.** All notice information will be logged in OpsMan and can be tracked by state/plate.

**Each plate holder's file must contain documentation of all noticing, whether via mail or phone. Written notices are to be mailed first class and include a return envelope, which is pre-addressed to the City of Stamford's designated remittance processing address. The System shall have the ability to prepare multiple notices of delinquency of individual tickets, composite notices by license number, and notice of partially paid tickets. The system shall maintain a record of all notices mailed and their mail dates. The System shall enable the user to access on-line all notices by ticket number, license number, date mailed, and the status of violations as they proceed through the noticing and collections cycles. Listings shall accompany the production of notices for quality assurance purposes. Notices shall be produced and sequenced for lowest mailing costs. Postage for the notices will be paid by the proposer and forwarded to the City for reimbursement.** **Comply.** All noticed will be logged under each plate holder in OpsMan. Phone notices will need to be conducted by the City, and can be logged manually in OpsMan where appropriate. Written notices will be mailed first class and will include a return envelope. Multiple notices of delinquency can be created for individual tickets, and OpsMan will record all notices mailed by their mail dates. All violators can access their notices online via RMCPay. For more information on RMCPay, please see pg. 32.



**The proposer shall be responsible for issuing notifications. The proposer shall research the mail addresses on all return mail, and re-mail a notice to the correct address within five (5) working days of receiving the returned mail. The proposer shall provide for the forms and postage for these delinquent notices. The City will reimburse proposer for postage. Comply.** Passport maintains an integration with every state DMV through NLETS, which allows it to find the address on file for each registered vehicle owner, regardless of the state. OpsMan will continue to mail notifications until payment is made or state rules dictate that additional intervention is required.

### *Customer Service*

**A toll-free telephone number shall be provided for the public to make inquiries. Such inquiries shall be responded to within 24 hours of the query.** Passport will provide first level, live telephone customer service for **City staff** between the hours of 8:00 AM and 6:00 PM EDT/EST and offers an additional line for emergency after hours support 24/7.

**To contact the Product Support Team:**

Monday-Friday 8AM - 6:00-PM EDT/EST

(980) 939-0990

Help@passportinc.com

After Hours Emergency Support

(866) 815-3043

[Help@passportinc.com](mailto:Help@passportinc.com)

Passport supports the City's customers by providing extensive training to City administrators on the system, so all support needs can be provided directly to the end users by City administrators. Passport will provide the *technical* support needed by the City for the entirety of the contract.

**Proposer's Customer service representatives shall be available during normal business hours of 8:30 AM until 5:00 PM to provide instructions and information on general parking policies and procedures, to handle complaints, and explain the administrative adjudication process of the City of Stamford.** Please see response to the question above.

**The public shall have encrypted or secure Internet on-line inquiry access (IPAY) by ticket number as well as through an automated telephone system (IVR). The proposer shall provide to the public the means, via an IVR System and an IPAY service at no cost to the City of Stamford. IVR and IPAY must be available 24 hours per day, 7 days per week. Features must include:**

1. The ability to pay for parking tickets with credit card, debit card, PayPal or by check.
2. The ability to review the status of a parking ticket. This shall include, but not limited to:
  - a. Open (Unpaid and never suspended).
  - b. Paid
  - c. Partially Paid
  - d. Dismissed
  - e. Upheld, pending payment
  - f. Contested
  - g. Pending Hearing

Comply. Passport offers both an IVR option and online portal for citation payment. For more information on RMCPay, please see pg. 32. The IVR system allows the violator to call a toll-free number and use the number pad to access and pay their citation. Similar to RMCPay, at the end of the process the violator will be asked to confirm their purchase and have both the citation and convenience fees clearly communicated to them.





**3. A customized recorded voice response system in English and Spanish shall be available to provide information about how to pay and contest tickets, registration violation information, and City of Stamford address information.** Passport's Citation based IVR system is currently only available in English.

**4. The automated telephone system must provide detailed real-time ticket information by ticket number. Information provided the public shall include: Ticket date, amount owed, and vehicle license number.** [Comply.](#)


**5. Ability for citizens to complete a form online that allows them to request additional detailed ticket information, including copies of manual citations, notices, or other correspondence.** Citizens will be able to see all applicable information regarding their citation via RMCPay. A form can be built out allowing additional information to be viewed as requested by the City.

**6. Ability for citizens to contest tickets on-line by completing a form online to provide the necessary violation information, stating their grounds for dismissal, and electronically attaching supporting evidence such as photographs, documents, and other materials. This information is then batched and queued for adjudicator review. These online submissions will be integrated into the processing services workflow, including all levels of authorization for adjudication, and batched and queued for adjudicator review. The system will prompt appropriate users with work lists. The website will have the ability to generate an automated email confirmation that the request was received. Additionally, the system will be capable of producing automated emails that informs the citizen of the outcome of the review.** [Comply.](#) Citation payments and appeals will be handled online through the customer web portal, RMCPay. Customer will be able to log into their accounts, review outstanding citations, and file appeals with attached documents as needed. If a customer decides to make an appeal, the information will be made available immediately in OpsMan for review by the Appeal Administrator. All adjustments to tickets that go through an appeals process will adjust accordingly in RMCPay for the customer to track.

**7. In an attempt to reduce the volume of frivolous hearings, the images captured by the parking enforcement officers using the camera enabled-handhelds will be presented to the public through the web page when an appeal/hearing for an individual ticket is requested on-line. Images will be retrieved and displayed when the violation number and license plate are entered (personal information is not disclosed for privacy reasons). The webpage showing the images will include a link to the pay-by- web page to encourage and facilitate prompt payment of the fine. Refunds: the proposer shall provide online, real-time information/data to the City of Stamford in order to validate refund balances specific to a request for refund on a registered owner or a specific ticket. Proposer will void original tickets when requested by the City of Stamford. The City of Stamford shall not pay for tickets received and/or paid for at City offices.** [Comply.](#)

*RMCPay:* Passport offers a dedicated payment portal for citations: Resolve my Citation ("RMCPay"). RMCPay is a City-branded website bearing the City's colors and seal to match other government websites and provide continuity to the City's operations. RMCPay pulls data stored in OpsMan and provides ticket information in real-time allowing the violator to immediately pay for their citation -- even receiving an email update upon issuance, if this feature is activated.

From RMCPay, violators are able to look up, pay or dispute their citation. The website follows all payment industry security standards; it is PCI-DSS certified and uses AES-256 encryption for data



storage. The violator will lookup their citation based on either the citation number or their LPN and state of registration. Passport uses a relational database, so every citation associated with the LPN will be returned, regardless of the method used to look up a single citation. Once a full list of all outstanding citations is returned, the violator will select which citation(s) they want to either pay or appeal. If a violator decides to appeal a citation online, they will be able to attach notes and photographs in support of their appeal.

To contest a citation, the parker simply clicks “Appeal” instead of “Pay” after they look up their citation. From here, they will enter their name, address, email address, phone number, reason for the appeal, argument for why the citation was given in error, and can attach any supporting evidence for their case.

RMCPay is PCI-DSS (v. 3.2) Level 1 certified and keeps all personally identifiable and confidential information secure, tokenizing and storing credit card data in a separate, isolated database.

*IVR:* If a violator doesn’t have access to the internet either through their phone or a computer, is impaired, or prefers not to use RMCPay, Passport also offers an interactive voice recognition service (“IVR”) for payment. The IVR system allows the violator to call a toll-free number and use the number pad to access and pay their citation. Similar to RMCPay, at the end of the process the violator will be asked to confirm their purchase and have both the citation and convenience fees clearly communicated to them.

Additionally, Passport’s IVR system offers all of the functionality of the RMCPay website and allows for citation inquiry, payment, and responses to frequently asked questions. Passport has the ability to route calls to live operators on its own internal support team, as specified as desired by the City in its question responses. During the implementation phase, Passport will work with the City to establish and IVR call flow and content that enhances the City’s payment environment. See below for a complete sample calling tree of Passport’s IVR system.

*Customer Support:* In addition to offering an IVR payment option, violators may call and pay through Passport’s Customer Support. Passport will receive the calls, record the payment, and take notes, all of which will be documented in OpsMan. Any notes taken by the Passport Customer Support team will be forever attached to the citation. The call center will be staffed Monday-Friday to answer all inquiries from violators.


The call center will also be available to answer any questions that any violator may encounter while using RMCPay.

Passport’s Citation Management Platform (“CMP”) offers several pricing models, including paying per citation issued, paid, paid online, per collection letter generated, or a percentage of collection. Passport will work with the City to determine the appropriate pricing model given the environment. Where pricing is per citation issued, Passport’s rate is \$1.00 per citation. For citations paid online, in the app, or through IVR, Passport will charge the violator a convenience fee of \$3.00 per citation.

Passport will maintain the highest level of PCI-DSS compliant, follow all NACHA guidelines, Federal Reserve Bank Regulation E, and meet all Office of Foreign Assets and Control (OFAC) requirements.

### *Ticket Review/Court Scheduling and Non-Court Review Process*

**Proposer shall provide for the scheduling, tracking and support services for the Court review and/or hearing process. Proposer will maintain a database of all review and/or hearing requests received showing current status of each request, integrated with parking ticket issuance and processing system(s). Comply.** Please see breakdown below.



**Review and/or hearing requests must be entered into the system(s) and suspended within two (2) business days from date of receipt. [Comply](#).** Passport is able to configure the suspension time frame for reviews and/or hearing requests within OpsMan.

**Proposer shall forward all inquiries regarding tickets in the reviews and/or hearings process to the City of Stamford for determination. [Comply](#).**

**Proposer will schedule all Court review and/or hearings upon request and forward schedule to the City of Stamford. The City of Stamford will provide the actual review and/or hearing officer for the reviews and/or hearings. The City will directly enter the results of the court/review process into the Ticket Management Processing System.** OpsMan will manage the entire appeals process. All citations and appeals will contain the violation number, reason for appeal, date of appeal, and the appellant's argument. If City administrators deem that a hearing is required for the appeal, they can use OpsMan to do so.. All appeal requests by a parker will auto-generate an email notification to designated City administrators. The City will have access to all appeals data in real time, meaning that an appeal can be viewed and decided instantly.

#### Appeals Breakdown:

Within OpsMan, the City will be able to see, approve, or decline appeals without having violators come into a physical location or call in. The appeals platform within OpsMan collects all of the data related to citations and can be manipulated and analyzed by the City through queries and reports. The City can track what reasons are given most often for appeals and tie that to a particular enforcement officer, zone, time of day, or day of the week. The City will also have access to look up a citation appeal by citation number or LPN and track the progress.

If desired, the judge or magistrate will be able to view the citation to see the type, fee, total fine, reason for appeal, argument, photographic evidence, and the officer who issued the citation. Within OpsMan, the appeal is evaluated and comments can be assigned to the appeal, which remain with the appeal even after a decision is made. The comments entered are custom and can be related to any internal evaluation process.

The "Appeals" drop down menu will give the City increased control over the adjudication of parking citations. Process Appeals returns a list of all citations that have been appealed through RMCPay, the appeal reason, the appeal date, and a description of the action. By clicking on an individual appeal, the administrator will be able to view the full citation detail and respond to the appeal. The administrator can accept or decline the appeal or adjust the fine amount. To streamline this process, OpsMan has a drop down list of Common Appeal Responses. Once the response is selected or written the administrator may attach any supporting attachments and change the status of the appeal. Each action will be stored with the citation for future use and reporting by the City.

The Appeal Follow Up selection, allows administrators to respond to appeals that were received through other channels, including emails. Processed Appeals returns a complete list of all of the appealed citations that have already been processed. Process Hearing Requests allows the City adjudicator to see which appeals have requested hearings for tracking and scheduling.

#### *Parking Permit Issuance and Management*

**The City's Residential Parking Permit (RPP) program (42 zones; approximately 3,200 permits), the City's beach passes (approximately 26,000 issued annually) and garage permits (approximately 3,000) provide important services to our citizens and enhances the overall quality of the City of Stamford's parking program. To support these programs the proposer's ticket processing system must include a parking permit management module that is integrated into the violation database. Key features of this module will include:**





**1. Housing an inventory of RPP districts and the regulated streets within these districts. [Comply.](#)** Inventory of the Parking Permit district and the regulated streets within will be available to the City in OpsMan.

**2. Full integration with the ticket processing module, enabling the resolution of parking citations issued incorrectly to permit holders, or the withholding of permit sales due to outstanding parking tickets or motor vehicle taxes [Comply.](#)** Once a permit has been issued and paid for, that permit holder's account will be updated in real-time. When parking enforcement officers enter a lot or zone that accepts permits, the database of paid parking sessions will include the LPN of all valid permits. When inputting an LPN to check for a paid session, the LPN of the permit holder will be included in that database and the officer will be alerted that there is an active paid session and will not be prompted to issue a citation for an unpaid session.

**3. Financial controls for the tracking and reconciliation of fees collected, and inclusion of fees in a collection report [Comply.](#)** The City will have access to the tracking and reconciliation of fees through OpsMan. Please see full permitting breakdown below for more information on the reporting capabilities available through OpsMan.

**4. Ability to perform all maintenance, updates and payments online [Comply.](#)** The permit application page for Passports Digital Permitting system is a custom-branded, mobile-optimized secure payment portal called RMCPay. The permit applicant will login to RMCPay with a phone number and email address and will be able to access an applicant's dashboard to manage their permits. The permit applicant will be able to see all permit information from the portal, see how many permits are available in a given zone, apply for permits, and track their position on a wait list. When applying, the permit applicant can use that day's date or a future date. For more information on the customers abilities through RMCPay, please see a full breakdown of Passports Digital Permitting system below.

**5. Ability to inquire online using a variety of search parameters [Comply.](#)** Passport is able to set up the City's RMC Permit portal that will allow a variety of search parameters to be available to an end user.

**6. Ability to generate notices for use in renewal or informational mailings [Comply.](#)** Passport will work with the City to decide on necessary notices or informational mailings.


**7. Integration with the ticket processing system cashiering module, allowing outstanding balances for parking tickets and new permit sales to take place in one transaction [Comply.](#)** Passport will work with the City to link both the permit sales portal and the outstanding ticket payment portal so that all citations are paid in advance before applying for a permit" .

**8. Configurable to match existing permit data entry flow, for easy transition [Comply.](#)**

**9. Allows for the interface with other systems [Comply.](#)** For more information on Passports open API, please see pg. 12.

**10. Ability to integrate with various LPR systems, including Genetec. [Comply.](#)** To enhance the enforcement experience, Passport has partnered with PCS Mobile to facilitate an integration to Genetec's License Plate Recognition (LPR) system, both fixed and mobile.

When a vehicle outfitted with Genetec LPR cameras passes through a parking lot or drives down a street, Genetec's system collects an image of each license plate, each vehicle, and records the time of capture and location of the vehicle. The data is processed and relayed to



the driver of the enforcement vehicle through a laptop fixed in the vehicle. The driver will continue to patrol the area until the LPR software determines that a vehicle is in violation. The integration allows the LPR system to monitor for violations related to nonpayment, invalid permit, and overstaying a free time limit on a parking space. When the LPR system determines that a vehicle is in violation, the driver must verify the plate number scanned to the image of the LPN. If the LPNs match, then the officer will hit "Enforce" from the laptop.

After the enforcement officer hits "Enforce," Genetec will drop the XML file with violation data (including all metadata and images) on a Passport hosted SFTP directory. Using an file transfer protocol ("FTP") scanning process when a new file is detected, OpsMan Mobile will issue an API call to recall the XML file. When Passport receives the XML file from the API call, it will be parsed and stored on Passport's cloud. OpsMan Mobile will then broadcast the new LPR violation to all OpsMan Mobile users. The LPR violation will be listed in a side menu of OpsMan Mobile titled "Violations from LPR." The nearest officer to the violative vehicle will be dispatched to issue the citation picked up by the LPR vehicle.

When the issuing officer reaches the vehicle, they will select the correct vehicle from a list of scanned LPR violations. Once selected, OpsMan Mobile will automatically redirect the officer to the Citation Issuance page, where all available information has been pre-populated. The issuing officer will then fill in the remaining fields to issue the citation. Once issued, that violation will be removed from the universal "Violations from LPR" list. Additionally, if no officer issues a citation for the LPR Violations, those violations will be removed from the list after 12 hours.

**11. Ability to utilize assign/allocate multiple permits to a single address** [Comply](#). Permit ability would be broken down by vehicle. Please see answer to question 12 below.

**12. Ability to assign multiple vehicles to a single permit tag (carpools, multi-vehicle families)** [Comply](#). The Digital Permitting Solution allows permit applicants to add multiple vehicles to their account, where permitted by the City. The vehicle LPNs will appear in the citation management system as a valid permit and those vehicles will not receive a citation. This has the potential to allow both vehicles to park legally within the same zone on the same permit, which can be mitigated by implementing Passport's Citation Management Solution. See Permit Marking below.


**13. Allows permit types to be defined with flat-rate, prorated or tiered fee schedules** [Comply](#). The City is able to dictate permit fees.

**14. Integration of vehicle owner information into ticket issuance database** [Comply](#). Passport's Citation Management platform and Digital Permitting platform operate through a single backend system allowing for all vehicle owner information to be integrated with the ticket issuance database. The data will be updated in real time.

**15. The resident permit application must be capable of generating various mailings that can be merged with the name and address file of the system** [Comply](#). Passport will work with the City to decide on necessary informational mailings.

**16. Capable of providing Residential Visitor passes, as well as temporary Residential Permits** [Comply](#). The City is able to decide on the parameters surrounding residential visitor and temporary residential permits.

**17. The resident permit application must provide the ability for applicants to register on-line, with the controls to ensure any delinquencies of tickets and/or taxes are paid first.** [Comply](#).



**18. Management reports must be provided relating to the functions of this program as designated by the City of Stamford. Comply.** Passport will work with the City to ensure all requested reporting is available.

**In addition, this fully automated parking permit system must have the ability to print address labels for all correspondence by permit number range. The system will have the ability to inquire on permit data by street address, name, and permit number. The inquiry function must be able to accept a partial search. Permit data must be able to be updated real-time. Permit system must accept new permits and provide a function that interfaces with the ticket system to inquire for delinquent tickets. The permit system must have the flexibility to allow the user to issue or not issue (based on supporting documentation) new permit. Comply.** The City will be able to look up information surrounding permits based on the aforementioned guidelines. All permit data will be updated in real time. New permits can be added as decided by the City. If there are parameters around the number of permits allowed at a time, a waitlist can be put in place. A complete breakdown of Passports Digital Permitting System can be found below:


### Digital Permits

Passport Permits allows applicants to apply for permits online, which will be tied to their license plate numbers, and may take effect immediately or following verification by the City. If verification is required, the Digital Permitting Platform allows permit applicants to upload documentation demonstrating their residency, employment, or other standard. Once the City has verified the applicant's status an email will be automatically sent to the applicant, informing them that they can pay for their permit and begin using it immediately.

Passport designed its Digital Permitting Platform to streamline the application process, reducing the number of in-office visits, and making enforcement easy and efficient. As permits are tied to LPNs, enforcing permitting is exactly the same as enforcing metered parking in an LPN-based environment and can be automated with the use of LPR cameras. Implementing Passport's suite of products, including *Parking* and *Enforcement* will greatly improve the City's parking management system and provide a more enjoyable user experience for its residents.

*Permitting* is comprised of an online portal for applicants, RMCPay; a backend management portal to manage the entire permitting platform, reconcile accounts, and automatically mail renewal notices, Operator Management ("OpsMan"); and a PCI-DSS compliant merchant processing and gateway service (optional). RMCPay is a PCI-compliant payment portal that is fully branded for each City and deeplinked from the City's official website. RMCPay will be fully configured to the needs of each client, depending on the types of permits offered, the verification requirements, prorating rules, and other unique features. The permit applicant will create an account, provide all necessary information, upload documentation to prove residency, employment, or another requirement, and pay for the permit. If the City requires verification, the permit applicant will not be able to complete purchase until verification is complete. Once the City has verified the applicant's status, the applicant will be emailed instructions on completing their purchase. RMCPay is also able to accommodate waitlists with automatic updates, notifications, and permit renewals.

Accompanying *Permitting* is Passport's backend system: Operator Management ("OpsMan"). OpsMan will become the main analytics dashboard for the City's parking management in addition to being the control board for parking operations. OpsMan aggregates data from all front end interfaces (mobile-optimized website, and IVR system), which is accessible in real time for enforcement, analytics, and management. Included in OpsMan is Passport's Permit Approval Queue, which allows cities to manage all waitlisted, renewal, and new permit applications for all permit types. Passport's



*Permitting* platform powers the New York City Housing Authority's permit system, including 17 different types of permits across all 5 boroughs. All data will be easily accessible, digestible, and manipulable for the City's exact needs.

In addition to providing the *Permitting* platform, Passport is also a payments company, allowing it to facilitate all payment processing. As a merchant processor, Passport handles the electronic payment transactions for the City. Passport will obtain sales information from the permit application, receive authorization and funds from the issuing banks, and send payment to the City. Passport is on the national registries of both Visa and Mastercard as a merchant service provider and undergoes annual PCI-DSS compliance audits.

As a merchant processor, Passport also offers gateway services, which can either be bundled with its merchant processing services or used in conjunction with the City's existing merchant processor. Gateways are an e-commerce application service that authorizes payments between the City and the permit holder. Gateways enable the City to process multiple transaction types (credit cards, debit cards, PayPal, ACH, Apple Pay, Android Pay, etc...) in real time. The gateway also offers protection by encrypting credit card data. Passport's gateway services tokenize the credit card data and transfer it using secure socket layers, providing additional security. Passport's gateway facilitates three merchant services functions: authorization, settling, and reporting while limiting fraud. The City may opt to use any of the 15+ gateways that Passport is integrated with, but in order to offer Apple and Android Pay, the City will need to be on Passport's gateway and must use a compatible merchant processor.

## User Experience

### *PERMITTING*

Registering for an account is a simple process that can be completed in under 1 minute. The permit applicant will go to the City's newly created, fully branded RMCPay website. This website will be in the format of <https://<CityName>.RMCPay.com> and can also be linked to from the City's official parking website. Once on the City's portal page, the permit applicant will have the option of signing in or registering for an account.

To register for an account, the applicant will enter either their email address or phone number. Once that is entered, Passport's system will automatically generate a 3-digit verification code. Depending on which method of registration the applicant used, they will receive an email or text message with the code. Once entered, the applicant will be asked to create a 4-digit PIN. The combination of phone number (or email address) and PIN will be the only login credentials needed to create an account.

Once registered, the permit applicant will select which type of permit they would like to purchase. (For a full description of permit types, please see page x.) The application process will vary based on the City's individual requirement, but a sample user experience for applying for a residential permit is as follows:



**1**

**2**

**3**

**4**

**Buy Parking Permits Online**

Welcome to the online portal to sign up, purchase and manage your permits for Reston Town Center. Submitting parking permit applications and their required information through this website is the most efficient and convenient way to buy your parking permits. Please have your vehicle information available before submitting a parking permit application.

The parking permits available for sale through the website are:

- Employee
- Individual
- Contractor

To view the parking permit requirements and rules for each parking permit please [click here](#)

Need an account? **Sign Up** | Already have an account? **Log In**

**Employer administrators**

[Click here to login with your verified email address](#)

If have not been verified, please contact [ParkRTCaccountchanges@lazparking.com](mailto:ParkRTCaccountchanges@lazparking.com) to request an account.

For any additional questions, please go to our [help](#) page to view FAQs and contact information.

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**Sign Up For Your Account**

Welcome!

You can create an account with an email address or a phone number. We will send a verification code during sign up so have your account choice available.

How should we contact you?

**By Phone**

**By Email**

Go Back

Copyright 2018

**Verify Your Phone Number**

We will call or text you a three digit numeric verification code to authenticate your phone number so we can create your account.

Please enter your phone number below and choose how we should contact you.

Country: +1 - United States

10 Digit Phone #: (123) 456-7890

**Text Me**

**Call Me**

Go Back

Copyright 2018

**Create PIN For Your Account**

To finalize your account you will need to set up a 4 digit PIN. Once created you will use this PIN with your verified email or phone number to quickly log in.

Please enter and confirm your PIN below.

Create PIN: [ ]

Re-enter Your PIN To Confirm: [ ]

**Create PIN**

Copyright 2018

To register for an account, select "Sign Up" and then follow the screen prompts to enter and verify a phone number or email address. Once verified, create a PIN and start an application.

## Permit Information

The first box of the application will outline the permit information, specifically the type (residential, guest, employee, etc.), zone, cycle, dates of validity, price, and availability. The zone relates to which area within the City the permit will be used. For residential permits, the zone will correspond to specific streets using cross streets for easy reference. The cycle details whether the permit is a one-time permit or recurring (monthly or annually) and whether it is prorated based on the date purchased or not. Availability will only appear where there is a cap to the number of permits that can be purchased within that zone. If the limit has been reached, this section will appear as "unavailable" and the applicant will either be placed on a waitlist or simply be denied the permit and have to apply again at a later date.

## Vehicle Information

Once the specifics of the permit have been detailed, the permit applicant will input their vehicle information. The permit will be linked to the vehicle's LPN, but to avoid fraudulent activities, such as sharing a license plate, Passport will also ask for the vehicles make, model, and color. Passport's Digital Permitting solution can be configured to allow multiple vehicles to use the same permit. To

accurately enforce multiple permits, Passport recommends the use of its Enforcement solution as well, though it is not necessary to activate this feature.

## Customer Information

The next section of the application is customer information. As all of Passport's systems are managed by the same back office, if the permit applicant has a valid Passport account with the City (through the *Parking* application) and has filled out their profile, then the permit applicant's name, phone number, and email address will prepopulate in the appropriate fields. This information can be edited or updated at any time using either the parking application or the profile section of the RMCPay website. Additionally, the state will be pre-populated to the state in which the City is located. This leaves only the street address, city, and zip code to be entered.

The screenshot displays a multi-column application form. The 'Permit Information' column includes fields for Type (Residential Parking), Zone (Downtown Piesantville), Cycle (Monthly - Not Prorated), Valid From (05/01/2018 thru 05/31/2018), Price (\$2.00), and Availability (Available). The 'Vehicle Information' column contains dropdown menus for License Plate State (North Carolina), License Plate Number (?), Make (Select a make), Model (Select a model), and Color (Select a color). The 'Customer Information' column features text input fields for First Name (Kristin), Last Name (Gatter), Address, Address 2, City, State (North Carolina), Zip Code, Phone Number ((980) 939-0990), and Email (help@passportinc.com). A black 'Add Vehicle' button is positioned below the vehicle information fields. The 'Verification of Status' section at the bottom features a yellow banner stating 'Please upload a proof of residence' and 'Uploaded 0 of 1 required documents', with a large grey area containing the text '- Drop files to upload (or click)'.


## Proof of Residence

If verification of status (residential, employee, etc.) is required to purchase a permit, the system can be configured to require documentation. The permit applicant will drag and drop the appropriate files to be uploaded to their application. The application will be sent to the approval queue, where a City administrator will be required to view, verify, and confirm the documentation. Once approved, the permit applicant will receive an email informing them of the approval and directing them to complete their purchase.

## Address Validation

Once the application has been completely filled out and the applicant has acknowledged the terms and conditions, the system will validate the address entered with USPS's database of address. This normalizes the address, putting it into a standard format. If the City has configured the system such





that a household may only purchase a limited number of permits, this normalization will be integral to the feature's operation.

### Order Summary

Following address validation, the permit applicant will be brought to an order summary page. This page will outline all permit details and the fees associated with the permit. Fees will appear as separate line items for the permit itself and credit card processing fees.

If the permit applicant has stored payment methods in their Passport account (via the *Parking* application), these same payment methods will be available to complete the permit purchase. However, if there are no saved payment methods, the permit applicant will enter all relevant payment credentials in order to complete purchase. The permit applicant can manage their stored payment methods at any time within the Payment tab of RMCPay. For security purposes, only a 4-digit tail will be visible and the parker will not be able to edit the credit card number, but may delete cards and add new ones as necessary.

### Subsequent Applications

If the permit applicant already has an existing permit and would like to add a second permit or renew their existing permit, they will visit the same RMCPay website either through the City's parking website or by visiting the site directly. The permit applicant will login using either their email address or phone number and unique PIN. Once logged in, they will have a view of all current permits with the options to renew, manage, change, or add a new permit.

## OPSMAN

The City will have complete control over who may access the backend system and even control what functions and reports can be accessed based on the role or individual within OpsMan. The City will have at least one main administrator, who will manage all other accounts including account creation, access control, and password resets. The City may designate whomever it wants to serve as a Main Administrator, but that person will have complete access to the entire system and so should be someone in a position of trust.

During implementation, Passport will work with the City to determine who should be an administrator (or main administrator) and what levels of access each role or individual should have. Once this is agreed upon, Passport will setup all administrator and provide a list of usernames and passwords for each administrator. Once logged in, the administrator will change their password to something unique and secure. After implementation, the Main Administrator will have access to reset administrators' passwords and adjust access to reports and dashboards, as needed.

### Login

Administrators will go to <https://ppprk.com/apps/opsman> to access the OpsMan. From there, they will use their unique username and assigned password to login. On the first login, the administrator will be prompted to change their password to a secure alphanumeric password. The default configuration is an eight character password containing one numeric character, though this can be customized by the City to require a specific length, special characters, numbers, upper and lower case requirements, and a set expiration date. Once logged in, the administrator will have a main toolbar that will help them to easily navigate through the portal. The number of available tabs on the toolbar will be dependent on the number of Passport products purchased by the City. Assuming just



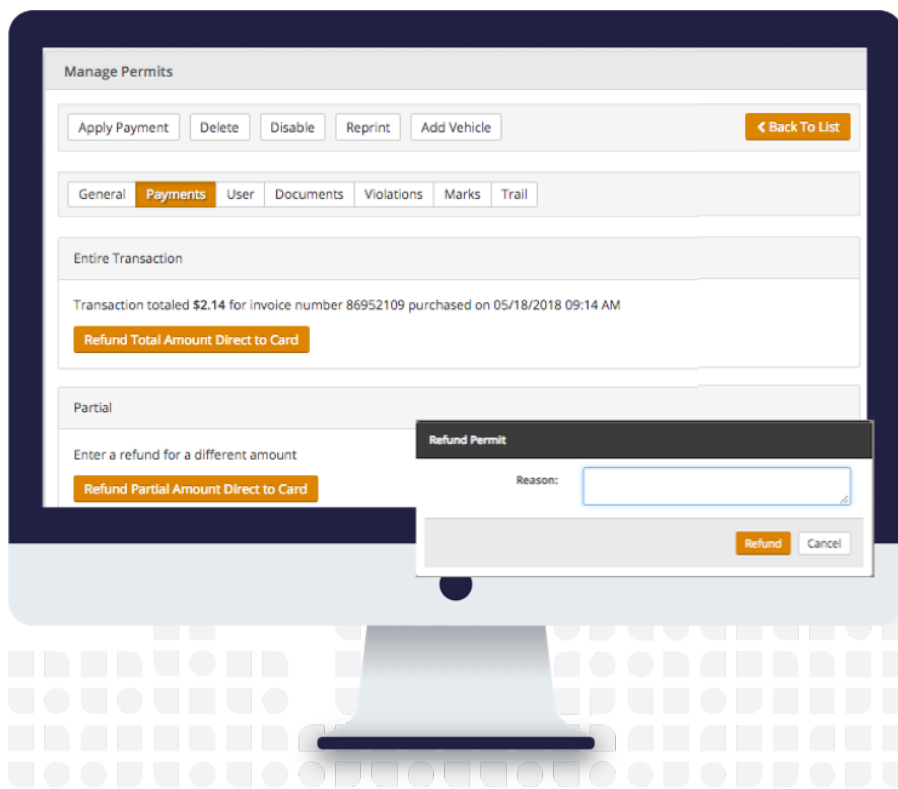
*Parking* by Passport was purchased, the administrator will see five tabs: Monitoring, Reports, Users, Wallet, and Customer Support.

## Permits

Clicking on the “Permits” tab will return a drop down menu with several options, including “Issue Permits,” “Manage Permits,” “Approval Queue,” and “Settings.” These will be the main tools needed to manage the City’s parking permit program and will facilitate everything from eligibility to messaging.

### Manage Permits

Manage Permits is arguably the most versatile page within OpsMan for any Digital Permitting client, allowing the City to control all aspects of existing permits, including waitlists. Using filters, the City will add “Waitlist Status” to the filters and then select “On Waitlist.” This will return a full list of all applicants who are on the waitlist, in order. Within the waitlist the City may move an applicant to the top of the list or exempt an applicant from the waitlist. Exempting an applicant will result in selling more permits than are available (i.e., 101 permits issued in a 100 permit zone). Despite the “Exempt” status, applicants on the waitlist will remain on the waitlist until the number of permits for that zone (or cycle or type) fall back below the threshold.



This tap will also allow the City to facilitate customer support by looking into each permit holder’s account history, issuing a new permit, removing a permit, issuing a refund, and disable permits. To refund a permit or remove payment, the City administrator will lookup a permit holder by permit number, LPN, name, or email address. Once the correct permit holder’s account is located, the administrator will have several options: General Information, Payments, User, Documents, Violations, Marks, and Trail. To issue a refund, the administrator will navigate to “Payments” and see each permit invoice listed as a separate line item. The actions associated with each line item include “View Receive,” “Email Receipt,” “Remove Payment,” and

“Refund.” When the administrator selects “Refund” they will be asked to refund the entire transaction or a portion (used for prorated permits). After selecting the amount to refund, the administrator will be asked to add a reason for the refund. The refund and reason for the refund will be immediately available in the “Trail” tab for future audits of the system.



### Approval Queue

If documentation is required to be verified prior to issuing a permit, the application (with all supporting documentation) will be available here. The City can configure the system to either notify an administrator every time an application is received in the Approval Queue or it may go into the system and regularly check the existing applications. Within the Approval Queue, the administrator will click on each permit application to see all relevant information (vehicles added, customer address, and documentation). If the permit is contingent upon valid documentation, the administrator will open the documentation and check its validity and verify the applicant's status. If the administrator deems the documentation to be valid and verifies the applicant's status, then they will click "Accept." Once clicked, the applicant will receive an email with directions on how to login and complete purchase.

For transparency purposes, all permit actions taken, including those in the Approval Queue, will be tagged and tracked in the final tab of the application: "Trail." A typical permit trail includes the date of purchase, approval action, waitlist status changes, renewals, and cancellations.

### Settings

Within Settings, the City will be able to manage permit types, cycles, proration rules, links, custom fields, and employee permits. Most clients prefer to have Passport create new permit types, which is recommended where the permits are largely recurring. However, certain clients like to have the control to create their own permit types. Passport will provide additional training on this, should the City and Passport agree that it would be easier for the City to control permit types (most applicable in collegiate markets with fixed cycle permits). Creating or editing permits is done through a series of yes or no questions that relate to which information is required, whether a physical permit is required, if renewals are allowed, and other questions, including number of vehicles per permit, per household, and details required during the application process. The City may also require specific documentation and approval or automatic issuance of the permit.

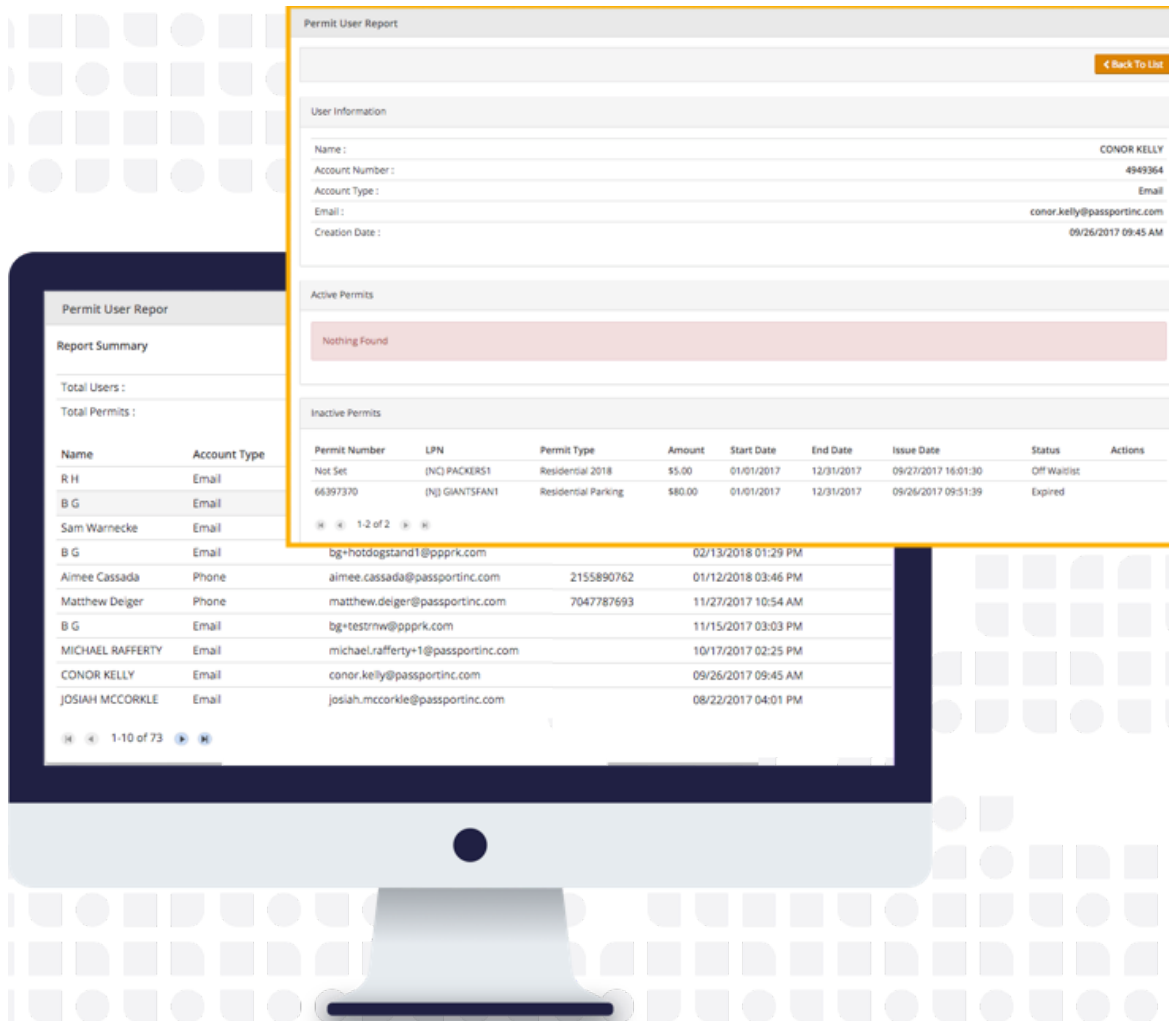
### Reports

The Reports tab allows the administrator to run predefined, ad hoc, and custom reports on the data collected by Passport Permitting. Passport Permitting aggregates all data related to the parking permit program and available integrations within the City's parking operations. OpsMan comes preloaded with financial, user, and administrative reports, though all reports and raw data may be exported to Excel for further analysis.

Using the Reports tab, the administrator will be able to select a predefined report, such as Permit User Report. Using filters, the administrator will select the type of permit (or permits) or a particular user. After clicking "Submit" OpsMan will return a report with a line-item summary at the top of the total permit holders and the total number of permits issued. Below the summary, each permit holder's name will appear with the account type (email vs. phone number) and the creation date of the permit. By clicking on any permit holder's name, the administrator will gain deeper insight into that permit holder, such as their full name, account number, account type, and a complete listing of active and inactive permits. The administrator can then select individual permits (both active and inactive) to get a full report on that permit, including the type, cycle, zone, vehicle it is attached to, citations associated with the permit (in multi-vehicle permit situations), and the complete trail of creation, approval, waitlist positions, renewals, and cancellations. When downloaded to Excel, this

report shows the name, email address, phone number, and creation date of each permit holder's initial account creation.


Passport is constantly iterating and updating its products, including the reporting functions in OpsMan. If the City requires a report that is not already created, Passport will work with the City to develop that report and, if it provides utility to other clients, will make the report available to other clients. Similarly, if other clients request a report with high utility, it will be made available to the City through regular updates.



## Permitting Features

### WAITLISTING

Passport's Digital Permitting Solution allows the City to automate its permit waitlist, while still leaving critical functions in the City's control. To set up a waitlist, the City will set a limit to the number of permits that may be purchased. The limit can be based on the permit type or zone. Once the limit is hit, the permit applicant will see that there is "No availability" when applying. The applicant may still



fill out the application and upload documentation for verification, but instead of being issued the citation, they will be added to the waitlist. The waitlist can be configured to show the applicant where they are on the waitlist, otherwise it will just inform the applicant that they are on the waitlist generally. Once a permit becomes available, the next available applicant on the list will be sent an email informing them that they have been issued a permit and asking the applicant to logon to their account to complete purchase. The City may control how many days the applicant has to complete purchase before losing the permit. If the applicant fails to complete purchase in that time, they will be bumped to the bottom of the waitlist.

### *ELIGIBILITY*

Many permits require that the applicant prove a particular status: resident, employee, student, etc. In order to accommodate this, Passport's Digital Permitting Solution can be configured to require applicants to upload documentation proving their status. The City can set a baseline requirement of the number and/or type of documents that may be uploaded with the application to demonstrate the applicant's status. Once uploaded, the documents will be available within OpsMan for approval and an email will be sent to the appropriate administrator for review. The City administrator will then go through each application in the approval queue verifying the documentation and that status of the applicant. Approvals may be done individually or in bulk, once the documentation has been verified. Once approved, the applicant will receive an email directing them to login to their account, find their "Inactive" Permit and complete purchase.

### *MULTI-VEHICLE PERMITS*


The Digital Permitting Solution allows permit applicants to add multiple vehicles to their account, where permitted by the City. The vehicle LPNs will appear in the citation management system as a valid permit and those vehicles will not receive a citation. This has the potential to allow both vehicles to park legally within the same zone on the same permit, which can be mitigated by implementing Passport's Citation Management Solution. See Permit Marking below.

### *PERMIT MARKING*

The combination of Permitting and Enforcement by Passport allow the City to use "Permit Marking" to accurately enforce multi-vehicle permits. Similar to chalking, Permit Marking will occur by inputting the vehicle's LPN. Once a valid permit has been verified for that vehicle, the permit will be temporarily marked as in use. If any other parking enforcement officer inputs the LPN of another vehicle on the same permit and no other valid payment has been made, the enforcement officer will receive a notification that the permit is already in use by another vehicle. This allows the City to offer the convenience of multi-vehicle permits to its residents, without concern for abuse of the privilege.

### *EMPLOYEE PERMITS*

Passport's Digital Permitting Solution allows the City to offer multiple types of parking permits from a single source, including employee permits. Employee permits are fully managed by each individual Employer, taking the onus off of the City while still providing the service. Each employer will have a separate portal to manage their employee permits (adding, editing, and removing employee permits as needed) and also aggregate all costs into a single invoice, reducing the City's merchant processing fees and improving cost management for the employers. All employee permits will still aggregate in the backoffice for reporting and customer support purposes, but the City will not be responsible for



the daily management of individual employee permits. Employee permits renew automatically each month, unless the employer cancels the permits prior to the end of the month. If the permits are not cancelled, the employer will receive an email each month informing them of the upcoming charges.

### *LIMITS*

Passport's Digital Permitting Solution allows cities to limit the number of permits issued within specific parameters. Generally, permits may be limited by the number of permits that may be issued in a given type, cycle, or zone. Permit types include residential, visitor, employee, etc. whereas cycle refers to the duration of the permit's validity, and zone relates to the physical boundaries of the permit area. Once the City sets a limit, a waitlist will be created, which is configurable by the City as to whether it shows the applicant's position on the waitlist or not. Permit limits can also be manually overridden for specific use cases, such as government vehicles.

A specific use case that many cities identified, and Passport now offers, is the ability to limit the number of permits that each household may purchase. Particularly helpful with residential and visitor permits, this feature normalizes each address during the application process into a standard format. With this formatting, if more than a set number of permits originate from a single address, that applicant will be prohibited to purchase anymore for a set period of time. The number of permits and the time frame (per month, per year, etc.) are all configurable by the City to meet its specific needs.

### *PREREQUISITES*

Passport is able to build in prerequisites and dependencies into permit types so that an applicant may not apply for a permit, until they have fulfilled a separate requirement. For instance, with visitor permits, Passport's Digital Permitting Solution can require that the resident applying for a visitor permit have a valid residential permit. This type of prerequisite allows the resident to control their visitor accounts without the City having to continually verify whether the resident is, in fact, a resident.

### *LINKS*

To create a smoother transition to a digital permitting environment, Passport can provide deep links from the City's parking webpage to specific permit types. Once the link is clicked, the applicant will be brought to a specific page within RMCPay. The applicant will still have the normal purchase flow (login or register first), but instead of selecting the appropriate permit from a list, they will be automatically directed to the correct page. This is particularly helpful where cities have zone names or numbers that don't easily identify the area and may cause confusion to an applicant. When applying, all pertinent permit information will be prepopulated, streamlining workflow. This information may be manually overridden if needed as well.

### *USER MESSAGING*

Passport's mission is to "transform the way agencies support their communities creating a network of trust and accountability." One of the ways that Passport exemplifies this mission is by providing tools for easy communication between the City and the end user. Passport's permit messaging features allows the City to send a mass email message to all (or a subsection) of permit holders

providing an update, incentive, or other message that is deemed necessary to them. The messaging can be limited by permit type, zone, or a specific individual or group (i.e., government vehicles).

## *ZONE OVERRIDES*

Passport's Digital Permitting Solution makes it easy for the City to adjust pricing in accordance with demand. This feature is applicable anywhere where a permit type has similar rules related to the cycle, duration, and proration, but different price points throughout the City. Once the permit is set up in accordance with City rules, Passport can then override the price in specific zones. Doing this allows the City to have a cleaner application process with only a single permit type, but adjust the pricing in areas with higher demand or which are otherwise more desirable.

## *LOGIN REQUIREMENTS*

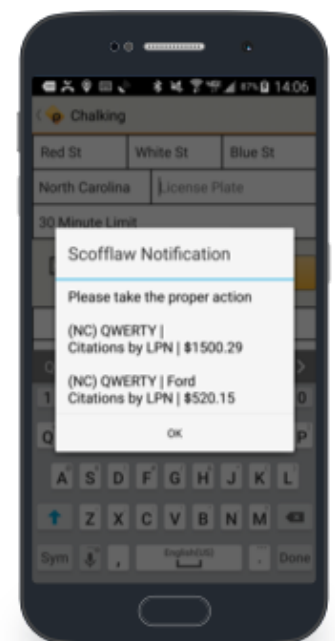
Passport's systems are designed to be configurable to meet the needs of each City. This attention to detail allows the City to put its own mark on its newest parking permit product, while still leveraging Passport's technical acumen. One such configuration is the login requirements. The City may chose during implementation to require only email login requirements or allow both phone and email. Limiting the registration process to email allows the City to make better use of User Messaging and ensure that the City is able to communicate with all permit holders easily.

## *EXTENSIONS*

Passport can facilitate permit extensions in two different ways, depending on the needs of the City. The first open is the most popular and is a simple extension. This option maintains the same permit number from month to month and merely updates the "valid until" date upon approval of another charge (additionally, the permit holder can opt into auto-extensions). Simple extensions give the permit holder the most flexibility, allowing them to approve the extension up to 7 days before the permit's expiration date. The other option is a renewal. Renewals are most often used when the City requires approval to receive a permit. The permit applicant will be required to login to RMCPay (also up to 7 days before expiration if desired by the City) and reapply for the permit. All pertinent information from the previous permit application will be carried over to the new application and the application will go into the approval queue as normal until it has been approved by the City. Both extensions and renewals will appear in permit holder's "Trail."

## *Towing*

**The successful proposer must provide the capability of providing networking services for the City's authorized agent/s regarding towing and booting. Paylock is currently the authorized booting agent of the City of Stamford. Comply.** OpsMan Mobile will alert the parking enforcement officer if an LPN is associated with a scofflaw. If the LPN does return a positive scofflaw alert, they will be prompted to take appropriate action, such as booting or towing the vehicle. The City is able to grant limited OpsMan access to a designated towing company or the administrators responsible for booting, so they will have access to the data and can take action immediately. With this limited access, the towing or booting administrator will be able to tag a vehicle as "booted" or "towed" in OpsMan, which will also update to OpsMan Mobile in real time.







The System shall enable the City's parking staff to perform the following on-line inquiries, updates, and processes:

- On-line inquiry of habitual violator status within the ticket database;
- Lists of violators eligible for towing;
- Ability to track authorization of tow by individual
- Upload of scofflaw lists to handheld ticket issuance computers
- Inquiry by:
  - License plate number
  - Vehicle owner's name
  - Vehicle Identification Number (VIN)
  - Ticket number
  - City of residence

Comply.

This module must include the ability to integrate and update, on a daily basis, motor vehicle taxes due along with outstanding parking tickets. Data sent must be compatible with the City's LPR system. In an effort to provide increased levels of customer service to those individuals who have been towed, the City requires the capability of accepting payment for all fees due (tickets, boot/tow fee, and/or taxes) at the point of vehicle impoundment. This requires a real time online cashiering terminal with the same online capabilities as those found within City offices. All information required for the release of a towed vehicle should be available at this terminal. This terminal should have the ability to accept cash, credit and debit cards.

This terminal, placed at the authorized agent location(s), should maintain the same level of reporting capabilities as those placed at City of Stamford offices and shall be password level protected to allow access to specific modules as determined by the City of Stamford. Comply

### *Booting*


The City currently uses Paylock as their self-release booting subcontractor. The proposer's system shall enable the City's parking staff to perform the following on-line inquiries, updates, and processes:

- On-line inquiry of habitual violator status within the ticket database;
- Lists of violators eligible for booting;
- Upload of scofflaw lists to handheld ticket issuance computers
- Inquiry by:
  - License plate number
  - Vehicle owner's name
  - Vehicle Identification Number (VIN)
  - Ticket number
  - City of residence
  - Make and Model

Comply.

Both the Tow and Boot system modules will enable the City of Stamford, its towing and booting contractors to track the status of vehicles from the point of apprehension to the point of release or disposal. All data must be compatible with the City's LPR system. The requisite notices will be generated at designated milestones within the City's custody of the vehicle. Comply. OpsMan Mobile will alert the parking enforcement officer if an LPN is associated with a scofflaw. If the LPN does return a positive scofflaw alert, they will be prompted to take appropriate action, such as booting or towing the vehicle. The City is able to grant limited OpsMan access to a designated towing company or the administrators responsible for booting, so they will have access to the data and can take action immediately. With this limited access, the towing or





booting administrator will be able to tag a vehicle as “booted” or “towed” in OpsMan, which will also update to OpsMan Mobile in real time.

### *Online Cashiering*

The proposer shall provide point of sale functionality and equipment at the City’s Accounts Receivable Department for accepting over-the-counter payments for tickets and residential permits, providing receipts, updating the ticket status, and controlling and balancing cash receipts. The equipment shall enable user access to the ticket number, permit number, license plate number, and vehicle owner name. The equipment shall apply all payments and adjustments directly to the database on a real-time basis. [Comply.](#)

The equipment shall be equipped in such a manner as to provide continuous cashiering operations in case of computer or communication outages. [Comply.](#)

The cashier equipment shall enable the user to perform the following transactions:

- Payment of an individual ticket, beach permit, garage/lot permit or residential parking permit. [Comply.](#)
- Payment of selected tickets issued to a given license plate. [Comply.](#)
- Payment of all tickets issued to a given license plate number with a single entry. [Comply.](#)
- Payment of all boot, impoundment and storage fees. [Comply.](#)
- Printing of a receipt, which displays all tickets or permits paid and total amount paid. [Comply.](#)
- Display of fund totals collected by cashier in the following categories: cash, check, money order, and credit card. [Comply.](#)
- Adjustments of amounts paid. [Comply.](#)
- Listing of all payment and adjustment entered. [Comply.](#)


**Audit Control-** The cashiering equipment shall possess a full audit log, including, but not limited to the following audit control features:

- Balancing a computer-produced cashiering report to the log printed on the cashiering terminal. [Comply.](#)
- Password sign-on, by operator. [Comply.](#)
- Daily balancing of separate reports by individual operators. [Comply.](#)
- Segregation of cash, check, and money order, receipts in balancing totals. [Comply.](#)
- Operator ID retained in every transaction. [Comply.](#)

City administrators will be able to perform all cashiering services through OpsMan. Upon starting their shift, the Cashier will go into OpsMan and enter the “Ticketing” Tab and then select “Manage Citations.” This page will bring up a menu bar on the right hand side, allowing cashiers to look up citations based on the issuing officer, citation number, LPN, Name, or Status of the citation. For a faster lookup, the Cashier will scan the citation from the violator, which will automatically locate the citation within OpsMan.

The cashier will then click on “Pay” in the menu bar at the top of the Citation Detail page. Once selected, the Cashier will then select the payment type. For cash or check payments, the cashier will enter the payment amount, select whether this is a payment plan (“Short Pay”), a description of the payment, the check number, and select to print and/or email a receipt. If the receipt is emailed, the cashier must enter the violator’s email address. Once the cashier selects “Pay” a receipt will be printed and the account will be updated.

Passport maintains a PCI-DSS Level 1 (v. 3.2) Compliance. No sensitive information is stored or transferred on the Passport database. The only information stored on the database are names, phone numbers, and email addresses. All credit card information is stored in an isolated card



storage database. That data is encrypted and tokenized to reduce the risk of credit card fraud in the event of a breach. As standards change, Passport will update accordingly.

Mail payments will be sent to the cashier to be applied within the backend system. The cashier will have limited administrative access within OpsMan to “pay” the citation. After the citation is paid, the account will be updated and a receipt will be printed for the violator’s records. The solution is user/role based with password protected access to keep an audit trail of all actions within the system and prevent impermissible access.

### *Collection Follow Up*

**Proposer must provide ticket collection services to the City. Proposer will be responsible to program all required fine and penalty escalation logic in accordance with Stamford Municipal Code of Ordinances. All notice language will be programmed in accordance with Stamford specifications for the various types of notices. [Comply.](#)**

**The following data will be included on the Stamford notices:**

- a. Notice number
- b. Mail date
- c. Ticket issue date and time
- d. Ticket number
- e. Location of violation
- f. Violation code
- g. Fine amount
- h. Penalty amount
- i. Total due for all listed tickets
- j. All tickets and motor vehicles taxes due for the plate holder on all vehicles
- k. name of owner
- l. plate number
- m. Other (capability to add additional data line at a later date)


All aforementioned information will be included on notices.

**In conjunction with the generation of Notices, a Notice Register will be generated listing, by state/plate, all tickets for which a notice is prepared. Information contained on the notice register will reflect the information contained on the notice. Each plate holder’s file must contain documentation of all noticing. [Comply.](#) All notice information will be logged in OpsMan and can be tracked by state/plate.**

### *System Implementation, Training & Maintenance*

**The Proposer shall:**

- 1. Conduct site surveys and prepare sites as necessary for installation and operation of the System. [Comply.](#)**
- 2. Oversee installation of required communication lines. [Comply.](#)**
- 3. Install all hardware and software at the City sites mutually agreed upon, in conjunction with City Information Technology staff, and initialize the System. [Comply.](#)**
- 4. Perform unit and interface tests on the installed hardware and communication lines. [Comply.](#)**

- 
5. Develop a test system designed to aid in the training of various personnel throughout the implementation and operations phase of the project. This system shall be separate from, but parallel to, the operational version of the System to facilitate hands-on training without the possibility of inadvertently affecting live data on the actual production database. [Comply.](#)
  6. Develop user manuals containing procedures relating to the ongoing operation of the System. [Comply.](#) Passport will distribute manuals during scheduled training sessions.
  7. Train specified City personnel in the use of the System. Conduct ongoing training of City staff in the operation and maintenance of the System. [Comply.](#)
  8. Create and validate databases. [Comply.](#)
  9. Affect a transfer of data from the current Vender's system. The proposer shall provide a complete schedule and report, based on its experience and expertise, of how to convert the entire system, including all historical data and electrical requirements of the site. [Comply.](#) For more information on Passports Harvester system, please see pg. 15.
  10. Start up and monitor the entire System, taking immediate corrective action on areas that are not operating in accordance with the requirements contained herein. [Comply.](#)
  11. Provide system management reports to the City on a regular basis to aid in monitoring system performance. [Comply.](#)
  12. Respond immediately to reports from the City of system failure and take corrective action. Proposer will be responsible for all revenue lost due to untimely response to System failures. [Comply.](#)

For detailed information surrounding Passport's implementation plan, please see pg. 57.

### *Monthly/Other Management Meetings*

1. **The Respondent must be available to have quarterly meetings** [Comply.](#) Passport will work with the City to ensure an adequate number of meetings are held to keep communication steady. Additionally, the City's project manager will be available via email 24/7.
2. **The Respondent must provide the technical services and when required to come to the City to rectify and issues in which any system/module is not working and in which the City/vendor is unable to transact business** [Comply.](#)

### *Reports*

Proposer shall provide a full complement management reports for the City of Stamford. Time range on these reports shall be available for any desired range of the City's choosing. The City shall have full accessibility to all data at all times. The Proposer shall provide in its proposal examples/samples of all standard reports in its database, including electronic online reports, as well as the following:

1. Report of revenue collected for a selected time period, report of tickets issued with violation code and fine, plus penalty amounts added to delinquent tickets during the reporting period [Comply.](#)

- 
2. **Status reports on all parking violations processed** [Comply.](#)
  3. **Payment report identifying collection results by month in which parking violations issued, to also include delinquent notices and DMV holds** [Comply.](#)
  4. **Habitual Violators Report listing registered violations include the latest DMV registered owner name and address** [Comply.](#)
  5. **Status report of open and closed parking violations** [Comply.](#)
  6. **Aged Accounts Receivable Report** [Comply.](#)
  7. **Citation issuance reports, including gap analysis, first and last issuance, officer productivity and issuance mapping** [Comply.](#)
  8. **Ticket void reports** [Comply.](#)

The Reports tab of OpsMan allows the administrator to run predefined, ad hoc, and custom reports on the data collected by Enforcement. Enforcement aggregates all data related to the issuance, processing, adjudication, and collection of citations and available integrations within the City's parking operations. OpsMan comes preloaded with financial, ticketing, and administrative reports, though all reports and raw data may be exported to Excel for further analysis.

Using the Reports tab, the administrator will be able to select a predefined report, such as Daily Citation Payments. Using filters, the administrator will select the zone or zones as well as the relevant dates. After clicking "Submit" OpsMan will return a report with a line-item summary at the top and a bar graph below. The summary will tally up the total Number of Citation Payments, Citation Payment Revenue, and Average Payment Amount for the time period selected. The bar graph will show the daily revenue collected. By hovering over a particular bar within the graph, a popup box will show the total revenue and number of transactions for that day. When downloaded to Excel, this report breaks down the data in the initial summary by day for further analysis.

Passport is constantly iterating and updating its products, including the reporting functions in OpsMan. If the City requires a report that is not already created, Passport will work with the City to develop that report and, if it provides utility to other clients, will make the report available to other clients. Similarly, if other clients request a report with high utility, it will be made available to the City through regular updates.

### *Reporting Requirements*

**The City must have the ability to run and print all standard management reports in real-time at any computer, laptop or tablet accessible by any person(s) with proper account privileges. All reports must be exportable in Excel or .CSV format.** [Comply.](#) All reports will be exportable in excel format. For more information on Passport's reporting capability, please see pg. 18.

**The system shall have the ability to schedule and send any report chosen by the City via email or printed at a City location.** [Comply.](#) Scheduled reports can be sent via a link by email to those parties wishing to be kept in the loop when the reports run.

### Ticket Issuance Control

**Reports must include, but not be limited to, the following:**

- **Missing Ticket Analysis Report: Identifies missing tickets within active ticket books by the name of the officer to whom the book was issued.**
- **Ticket Issuance by Officer: Displays the number of tickets issued by each officer by type of violation. Type of violation is identified by the violation code.**

- **Ticket Disposition by Officer:** Displays by issuing officer, the tickets issued, paid, dismissed, unmatched at DMV, and voided.
- **Issuance Performance by Officer:** Provides a summary of ticket writing errors by officer.
- **Violation Analysis by Issuing Agency:** Displays the tickets issued by each issuing agency by the number and percentage of total tickets issued for each violation.
- **Ticket Issuance by Location:** Displays the number of tickets issued for each agency by violation broken down by location.
- **Ticket Disposition by Location:** Summarized issuance by area with disposition results.
- **Citation Location Issuance:** Mapping of officer's location throughout the day, including ticket issuance locations.

For a full breakdown on Passport's reporting capability, please see pg. 18. Any reports that are not currently available can be built for the City.

Towing

**Reports must include, but not be limited to, the following:**

- **Tow Activity Report.** Issued monthly. Sorted by company, reflects how many vehicles were towed, the date towed, where the vehicles were towed, the number of tickets outstanding against individual vehicles, the value of the tickets, and the date the ticket was paid.

For a full breakdown on Passport's reporting capability, please see pg. 18. Any reports that are not currently available can be built for the City.

Monthly Summary Management Report

**Information required on these reports includes, but not be limited to, the following:**

- **Monthly and year-to-date fine collections;**
- **Monthly and year-to-date new ticket processing;**
- **Monthly and year-to-date dismissals and suspensions;**
- **Number of void/cancellations for the current month and year-to-date by ticket type;**
- **Number of complaints received for the current month and year-to-date.**

For a full breakdown on Passport's reporting capability, please see pg. 18. Any reports that are not currently available can be built for the City.

### *Ad-Hoc Reporting Requirements*

**The System shall possess a user-friendly report writer feature to allow the City to query and generate ad hoc reports on-line. Proposer shall provide on-line query and ad-hoc reporting access. The online query or ad-hoc reporting tool must directly access data in the master database to provide accurate real-time information. All reports must be exportable into a usable excel format.** Comply. Within the Reports tab of OpsMan, the City's Administrators are able to run ad hoc reports on the data collected by Enforcement. Enforcement aggregates all data related to the issuance, processing, adjudication, and collection of citations and available integrations within the City's parking operations. OpsMan comes preloaded with financial, ticketing, and administrative reports, though all reports and raw data may be exported to Excel for further analysis.

### *Management Dashboard*

**To optimize the utility of violation and other data for the Parking and Transportation Department's management staff, Proposer will generate customized graphs, bar charts, pie charts, scatter-plot diagrams, conical diagrams, and many other presentations of program data that allows for the rapid identification of performance trends. Additionally, all data shall be exportable to a usable excel format. The reporting "dashboard" will be set as the home page for designated City users. The dashboard will provide up-to-date information on**



performance, including activities by day, month-to-date, year-to-date, and graphic illustrations to identify the year-to-date trend as compared to the prior year. [Comply](#).

### *Forms*

**All forms, delinquency and late notices, and correspondence shall bear the City of Stamford seal and information and conform to all applicable state and local laws and regulations. Prior approval by the City of Stamford shall be obtained before use of or changes to any such forms or notices.** [Comply](#). All forms will be branded for the City and bear the City of Stamford seal.

### *System Support*

**For the term of the agreement, proposer shall provide on-going support to the City of Stamford for access and interface with the parking ticket and residential parking permit database.** [Comply](#). Passport will provide first level, live telephone customer service for **City staff** between the hours of 8:00 AM and 6:00 PM EDT/EST and offers an additional line for emergency after hours support 24/7.

#### **To contact the Product Support Team:**

Monday-Friday 8AM - 6:00-PM EDT/EST

(980) 939-0990

[Help@passportinc.com](mailto:Help@passportinc.com)

After Hours Emergency Support

(866) 815-3043

[Help@passportinc.com](mailto:Help@passportinc.com)

Passport supports the City's customers by providing extensive training to City administrators on the system, so all support needs can be provided directly to the end users by City administrators. Passport will provide the *technical* support needed by the City for the entirety of the contract.

**Proposer shall provide an on-line user's manual, which includes systematic instructions for accessing computer database information, and a list and description of any codes used in screens accessed by the City of Stamford.** All City administrators will have unlimited access to short training videos and documentation on each customer support response within Passport's Client Success Center, providing a standardized approach to common customer issues.

#### **Proposer shall provide orientation and training on the use of software and the database.**

Passport will provide both remote and on-site support for the term of the contract. As the solution is SaaS based and requires no hardware installation, the amount of on-site training is typically minimal and will be discussed in further detail if Passport is awarded the contract.<sup>5</sup> The majority of training will be focused on the management and administration of OpsMan, specifically related to reporting and the customer service portal.


**Proposer shall provide system backup procedures for system failures.** Passport hosts all data on Amazon Web Services ("AWS"), which also supports Netflix, Adobe, and Lyft. Passport's services are hosted on multiple, redundant servers located across the United States. In the event of a power failure or disaster that affects the East Coast server, Passport automatically utilizes the other active server, with no lag in performance. Each server has a replicated version of the database such that the City will not experience any impact to performance due to downtime of one database service center.

**Proposer must provide a comprehensive system disaster plan.** Passport maintains a comprehensive IT disaster recovery plan, which is formalized and assessed regularly. The plan

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<sup>5</sup> If deemed necessary by both parties, Passport will provide one on-site visit at no expense, however, the cost of additional on-site visits shall be borne by the City.





covers all essential and critical infrastructure elements, systems, and networks in accordance with key business activities. The disaster recovery plan covers a myriad of potential threats and disasters to the system, as well as the remedial actions that should be taken in the event of disaster. Passport has contemplated and planned for every possible scenario, including failures of each partner in the process. Should a disaster occur, Passport's Disaster Recovery Team will assess the situation and is responsible for establishing facilities for an emergency level, restoring key services, recovering to business as usual, coordinating activities with third parties, and create the incident report. Please see Appendix A on pg. 90 for Passport's full disaster recovery plan.

To prevent disasters from happening, Passport undergoes a number of preventative checks and verifications. These checks are run alongside the production database, looking for anomalies and discrepancies in the system. Following any incident requiring the Disaster Recovery Team, a report is generated outlining the incident, the people notified, the actions taken, the outcome, and a full assessment of the effectiveness of the recovery as well as a breakdown of "lessons learned."

**Proposer must complete the repair and replacement of all hardware devices that fail to perform as specified. The proposer shall respond within one (1) working day of a reported equipment or software failure by providing the on-site technical support at the City's premises if the fault lies at a City site.** Passport's software has an infinite life expectancy, and will be maintained by Passport for the duration of the contract. The hardware recommended by Passport has its own warranty, and life expectancy is based on the device chosen.

**Proposer must be on-site the date of the system launch.** [Comply.](#) Passport's dedicated Client Success Manager, Chris Watt, will be on site for the date of system launch.

### *Proposer Qualification*

**As five (5) years' experience by the Proposer of processing municipal parking tickets and providing processing and collection services equal to or superior to those detailed in this document are not required, it is preferred.** [Comply.](#) Passport possesses 5 years of experience processing municipal parking tickets, of which 4 years have been spent specifically in the State of CT for the City of New Haven.

**Proposer must be a fully accredited collection agency legally qualified to contract for collection services in the State of Connecticut and be a current member of the American Collectors Association (ACA).** [Comply.](#) For the last 4 years, Passport has performed primary collections for the City of New Haven, CT. Passport maintains a direct integration with the State of CT DMV and NLETS for national DMV lookups. If necessary, Passport will utilize its subcontractor Linebarger Goggan Blair & Sampson, LLP Attorneys at Law to perform any necessary "secondary" collections and fulfill the City's requirement for a fully accredited collection agency.

**Proposer must have a current contract with the State of CT DMV to access violator information.** [Comply.](#) Passport has established and maintains a direct integration with the State of CT DMV and NLETS for national DMV lookups. For more information on Passport DMV services, please see pg. 29.

### *Proposer Background Information*

**Proposer must demonstrate its history and experience in Parking Ticket processing. Proposer shall provide a listing of all its corporate officers and the specific staff persons that will oversee and provide services to the City of Stamford.** Please see Passport's Key Personnel information on pg. 7.

**Proposer will provide a listing of all former ticket processing clients and the reasons why the Proposer no longer maintains those contracts. Proposer will also provide listing of any ticket**





**processing contracts that have been terminated, lost, canceled, and abandoned throughout the history of the company.** Please see the chart below for a list of former ticket processing clients:

Blue Island, IL (tentative departure)	The City as a whole switched to a comprehensive record management system and parking tickets were too small a part of the new operation so the decision was made to migrate the tickets from Passport's system to the new model.
Park Place Columbus (potential return)	The operator was looking for a system that was primarily focused on event management, which is not currently in line with Passport's near term roadmap.

### *Security*

**The Proposer shall possess security features that limit System access to authorized personnel. The System and its procedures shall contain audits trails and controls to account for all dispositions, notices, transactions, and payments, from ticket issuance through final resolution and archiving. Additionally, the Proposer shall establish and maintain procedures in all data control areas that will reduce the opportunity for an employee to damage, alter, or compromise data.** The City will have complete control over who may access the backend system and even control what functions and reports can be accessed based on the role or individual within OpsMan. The City will have at least one main administrator, who will manage all other accounts including account creation, access control, and password resets. The City may designate whomever it wants to serve as a Main Administrator, but that person will have complete access to the entire system and so should be someone in a position of trust.

During implementation, Passport will work with the City to determine who should be an administrator (or main administrator) and what levels of access each role or individual should have. Once this is agreed upon, Passport will setup all administrator and provide a list of usernames and passwords for each administrator. Once logged in, the administrator will change their password to something unique and secure. After implementation, the Main Administrator will have access to reset administrators' passwords and adjust access to reports and dashboards, as needed. Access to OpsMan requires a valid username and password to keep an audit trail of all actions within the system and prevent impermissible access.



## IMPLEMENTATION TIMELINE

Implementing *Enforcement* by Passport will be driven by two teams at Passport: Client Success and Service Delivery utilizing an Agile methodology. Client Success is comprised of Client Success Managers, Product Support Specialists, and Customer Support Representatives, who will all be available to the City from the point of contract execution to expiration. The Service Delivery team is made up of Project Managers and Implementation Specialists, whose sole responsibility it is to quickly and efficiently launch products for clients. The Implementation Specialists will work diligently behind the scenes to build rates, establish integrations, and test the system, while the Project Manager works directly with each City and its stakeholders. The City's dedicated Project Manager will develop a tailored Project Plan outlining all milestones, deliverables, and roles and responsibilities of each key stakeholder both internally and externally with quality control and testing throughout.

Passport developed an implementation process that is easily digestible, transparent, and has successfully launched Passport's mobile technology solutions in more than 450 locations in a timely manner. To keep the process lean, Passport maintains active integrations with 30+ software providers in the parking, enforcement, and transit industries as well as 15 major merchant processors. Using this process, Passport is able to launch its *Enforcement* platform in 70 days from contract execution on average. Passport designed its process to be dynamic and flexible, while still controlling for quality. The project is laid out into smaller pieces, which can be dynamically implemented as the City provides Passport with necessary information. The faster the City can return required forms, provide contact information, and approve steps, the faster the system can be implemented -- oftentimes in under 70 days!

To keep the City on track, the dedicated Project Manager will hold weekly calls with City stakeholders, providing updates, asking questions, or generally pushing the project to the finish line. With Passport, the City receives a dedicated team that is always available to the City to answer questions, take feedback, adjust the system, fix bugs, brainstorm ideas, and ensure that the City is getting exactly what it expects.

Implementation will be split into four categories: Discovery, Setup, Training, and Launch. Only discovery and launch have dependencies built into them. In Discovery, the City will be asked to fill out an Information Request Form, which covers all pertinent aspects of the current parking environment, including providing contact information for representatives at other service providers (meters, pay stations, LPR, etc.). The only other dependency occurs in the Launch stage -- ***Passport will not launch a product without the City's express approval.*** Throughout the process, Passport will continually ask for feedback and approval and this last step should be a simple decision, but still one that should and will be made by the City alone.

The following is a complete breakdown of each stage, with average time frames. Again, these time frames are subject to change, based on the Scope Alignment Meeting and the City's timing requirements, and, like any good partnership, can only be improved by open and effective communication.

 **Discovery** 10 Days

Milestone	Passport	Client	Description
Kick-off & Project Foundation Training	✓	✓	<p>30 minute meeting to welcome the City to the Passport family, review the onboarding process, and walk through baseline product training.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Client Success Manager</li> <li>• Sales Executive</li> <li>• Dedicated Project Manager</li> </ul>
Complete Information Request Form		✓	<p>This form gives Passport a complete understanding of the detailed specifics of the parking environment as it exists at the time of contract execution.</p> <div style="background-color: #f08080; padding: 5px;"> <p>This is one of only two dependencies in Passport's implementation process. This form <b>must</b> be completed prior to the Scope Alignment Meeting.</p> </div>
Scope Alignment Meeting	✓	✓	<p>1 hour meeting to review the Info Request form and define the scope of work. Topics of discussion include delinquency notices, merchant processing, and necessary integrations.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Client Success Manager</li> <li>• Dedicated Project Manager</li> <li>• Implementation Specialist</li> <li>• Client Lifecycle Marketing Manager</li> </ul>
Determine Target Launch Date	✓	✓	<p>Based on the Information Request Form, Scope Alignment Meeting, and the City's timing needs,</p>



Passport will set a Target Launch Date.

- Passport Team Members:
- Dedicated Project Manager
  - Implementation Specialist



# Setup

60-80 Days

Stage	Milestone	Passport	Client	Description
Data Flow	Confirm Data Flow	✓	✓	<p>During the Scope Alignment Meeting, necessary integrations will be discussed, including what brand of pay stations/meters are used and how paid parking spaces are enforced. In order to make this step seamless, the City will be asked to provide contact information for each 3rd party vendor.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• Implementation Specialists</li> </ul>
	Finalize Integration Details			<p>Passport will work alongside 3rd party vendors (pay stations, meters, enforcement providers, LPR technology) to set up an integration for each 3rd party, allowing data to flow smoothly between it and Passport.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• Implementation Specialists</li> </ul>
	Complete Integration Testing	✓		<p>Once the integrations have been configured, Passport will test the integration using in-house consultants Quilmont in conjunction with crowdsourced testing software.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• Implementation Specialists</li> <li>• Quilmont QA Testing</li> </ul>



	Approve Data Flow		✓	Once Passport has thoroughly tested the integration, the City will be given access to a non-production environment to perform its own testing. Once satisfied with the integration, the City will sign off on the integration.
Funds Processing	Confirm Gateway Provider	✓	✓	<p>During contracting, the City will select their Merchant of Record. During the Scope Alignment Meeting this will be confirmed and Passport will ask for contact information for the City's Merchant Processor and Gateway.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• Implementation Specialists</li> </ul> <p>If Passport is the Merchant Processor and Gateway, this stage can be skipped.</p>
	Provide Merchant Details		✓	<p>If Passport is not the Merchant Processor and Gateway, the City will be asked to provide credentials for a Card Not Present Account that has been set up for the mobile payment parking sessions. Once the provider is confirmed, passport will provide a list of required credentials.</p>
	Confirm Successful Test Transaction	✓		<p>After credentials are input to the system, Passport will run a few test transactions to ensure the integration works.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• Implementation Specialists</li> </ul>
	Approve Fund Processing		✓	<p>After Passport has thoroughly tested the merchant processing integration, the City will be asked to provide written confirmation that the funds from the test transactions are available in its bank account.</p>
Citation Configuration	Complete Citation Buildout	✓		<p>Using the Information Request Form, Passport will build the citation environment. The environment includes the types of citations available, the fines associated with</p>



each, the escalation schedules, and the actual form that each officer will fill out when issuing a citation.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists

Perform Citation Testing

✓

✓

After the environment is built, both Passport and the City will have time to test the new platform. Passport will run diagnostic testing and quality assurance, while the City will test the platform by issuing dummy citations.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists
- Quality Assurance Engineers

Approve Citation Configuration

✓

After testing is complete, the City will be asked to give written approval of the citation environment.

Build RMCPay

Setup Website

✓

Using the logo and color schemes provided in the Information Request Form, the City will customize the base RMCPay website to the City's branding.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists
- Citation Management Software Engineers

If the City requires an integration with its court system, that integration will be built and tested at this time.

Approve Website Design

✓

When the website is built, the City will be asked to approve the design in writing.

Delinquency Notification Configuration

Letter Template

✓

✓

Passport will provide the City with a template for the delinquency notifications. The baseline Passport template has been extensively tested to increase compliance and direct the violator to the RMCPay website. The City may edit the content of the letter, leaving the



formatting intact to the extent possible.

Passport Team Members:

- Dedicated Project Manager

Approved Template to Engineers ✓

Once the City has provided edits, which are then made, and the letter template is approved, Passport will pass the template to its engineering team. The Citation Management Engineers will build the templated letter into the City's OpsMan portal to be automatically generated at points of escalation. The Engineers will build in a series of formulas to alert the system which letter to send at each interval of time.

Passport Team Members:

- Dedicated Project Manager
- Software Engineers

Setup letter Dissemination in OpsMan ✓

After the letter template has been built into OpsMan, Passport's Service Delivery team will configure the system to the City's escalation schedule, using the algorithms built by the engineers.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists

Legacy Citation Transition Write Test Script ✓

Passport's Engineers will write a test script to transfer the City's citations. The script will account for how many citations are outstanding, how many unique citation codes are contained in those outstanding citations, and how those outstanding citations will fit into the new Citation Management Platform.

Passport Team Members:

- Citation Management Software Engineers

Test Transition ✓

With the transition script written, Passport will test a sample batch of outstanding citations. After the script is run, Passport will cross check the sample batch from the old system to the new. The transferred data will be





pushed to a non-production environment.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists
- Citation Management Software Engineers
- Quality Assurance Engineers

Full Transition



Two days before the Go-Live date, Passport will transfer all outstanding citations over to the new system. This will transfer all data up to the date of the transfer. Once the new system is live, Passport will then transfer the data from the two day transfer over to the new system. All data will be transferred without any lossage.

Passport Team Members:

- Dedicated Project Manager
- Implementation Specialists
- Citation Management Software Engineers

## Training

3-5 Days

Milestone	Passport	Client	Description
Confirm Training Schedule	✓	✓	<p>Once a majority of the milestones have been completed and the Target Launch Date is confirmed, Passport will set up a time to train the City. Depending on what was agreed upon in contracting, this will either be remote or in-person.</p> <p>In-person training is not any more effective than remote training and does cost extra.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Client Success Manager</li> </ul>
Complete Training Preparation	✓		Prior to the training session, the



City's Dedicated Client Success Manager will provide detailed instructions to the City on how to best prepare for the session, including who should be present, the amount of time it will take, and any required hardware (i.e., computers with wifi connectivity and smartphones).

Passport Team Members:

- Dedicated Client Success Manager

Training

✓

✓

Passport will host a 1 hour training session with any City employees who will interact with the new *Parking* system. Passport recommends training all parking staff (operator managers, operators, and the press team), anyone responsible for adjudication of parking and traffic citations, city accountants, the police technology chief, and parking enforcement manager all be present for training.

Passport Team Members:

- Dedicated Client Success Manager

All training is done via a "Train the Trainer" method, equipping each person present with the tools and knowledge to train their teams now and in the future.

Complete Hands-on Assignment

✓

After training, Passport will provide a hands-on assignment for City staff to complete to test everyone's comprehension of the system. Passport will continue to work with the City until all key staff members feel comfortable with the system prior to launch.

Passport Team Members:

- Dedicated Client Success Manager



# Launch

10 Days

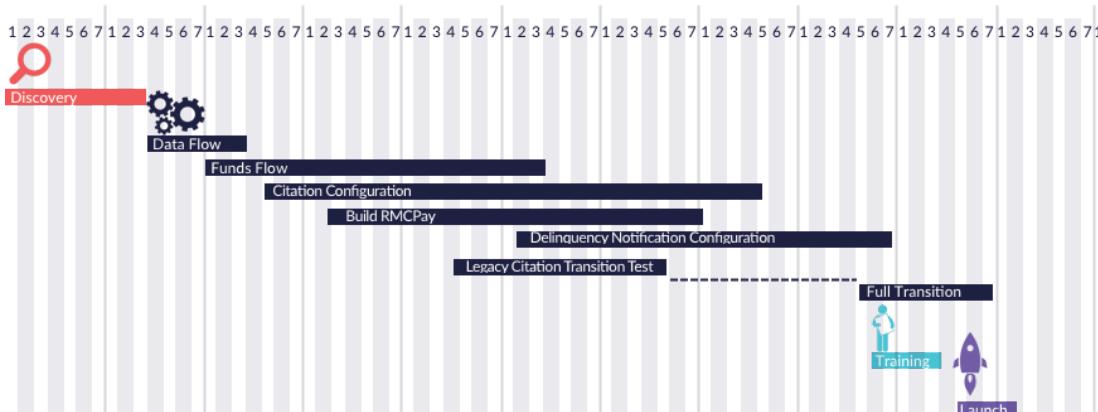
Milestone	Passport	Client	Description
Provide Final Launch Approval		✓	<p>Prior to launch, Passport will send a Launch Approval Email to the City seeking written approval of the system.</p> <p>The system will not launch without the City's written approval.</p>
System Launch	✓		<p>The system will be moved from a non-production to production environment, press releases will be published, and the launch marketing campaign will kick off.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Project Manager</li> <li>• <i>Parking Engineer Team Lead</i></li> </ul>
Post Launch Statistics	✓		<p>1 week after launch, the Client Success Manager will provide a statistics dashboard to the City. This dashboard will show the City's statistics during its first week of launch (utilization, users, etc...) and show benchmarks of other similarly situated Cities after the same time period. The Client Success Manager will work with the City to understand what this data means and how to leverage it for continued growth.</p> <p>Passport Team Members:</p> <ul style="list-style-type: none"> <li>• Dedicated Client Success Manager</li> </ul> <p>The City may decide to increase its marketing package at this stage, which will be appended to the contract.</p>
Client Effort Score Survey		✓	<p>After launch, the City will receive a survey to rate its satisfaction with the onboarding process. Passport is always seeking to improve this</p>

process and wants the City's candid opinion on ways to improve each client's experience.

Passport Team Members:

- Dedicated Client Success Manager

The following is a typical Gantt chart for Passport's implementation timeline. As the process is more dynamic than chronological, each client's Gantt chart differs based on when information is turned over to Passport. This chart is based on a 10 week implementation.





## VALUE ADD

Passport's entire suite of products, the Citation Management Platform ("CMP"), Digital Permitting Platform ("DPP"), and Mobile Payment for Parking ("MPP"), were designed to work in tandem with a single backend that operates as the source of truth for all parking operations within the City. Many cities will start with one product and later transition into the other products to create a more seamless experience, not only for a single backend management system for the City, but a more seamless experience for the City's parkers. In Cities that use both Passport's CMP and MPP platform, Passport can include a "Pay Citation" page within the Parking application for the parkers to conveniently pay for their citation rather than having to go through the RMC Pay website. Below is more information on Passport's Mobile Payment for Parking platform.

### Mobile Payments

Passport's mission is to challenge traditional solutions in ways that simplify experiences and create value. Guided by this mission, Passport's corporate vision, and the principles that guide its actions, Passport redesigned its Mobile Payment for Parking platform in 2017, creating Passport Parking: the most advanced and user friendly mobile payment app on the market.

Passport is committed to the continual innovation of its products and services to ensure that each feature is marketable, practical, and increases adoption. Over the past seven years, Passport has demonstrated its commitment to that approach by leading the market in innovation -- introducing features and functionalities that have since been adopted by competitors in order to try to keep pace. Passport Parking is the latest instance of such commitment, built on cutting-edge technology that paves the way for future advancements. The new application is part of an upgraded platform that will continually evolve over the term of the contract, provide enhanced analytics to the City, and be fully supported by Passport's vast experience implementing its solutions, increasing user adoption rates, and marketing with Passport's award-winning team.

### Transition Experts

Transitioning providers is an important decision that should be handled carefully. It is imperative that the City of West Palm Beach chooses a provider well versed in transitions for large scale and high profile installations. Passport is the industry expert at transitioning clients from one technology payment provider onto Passport's best-in-class platform, with over 50 mobile parking displacements. With every displacement, Passport has exceeded the previous provider's utilization within the first few months. In fact, when Passport recently displaced ParkMobile in Metro-North Railroad (a suburban commuter rail service run by the Metropolitan Transportation Authority in New York City area) its utilization rate was exceeded in just two weeks. Passport's proven track record of success transitioning clients has provided Passport the ability to understand the dedicated work that goes into building the current system which will allow us to preserve its integrity during a transition.

In choosing Passport Parking, the City not only gets a redesigned, modern, user-friendly front-end application, it also gets a mobile optimized website that mimics the application; a completely secure IVR system; the most powerful, proprietary backend management tool on the market; and the option to power it all with Passport's secure Merchant Processing and Gateway services.



Passport Parking's front-end application is a native application that is available for free on the Google Play and Apple App stores, which will be used by parkers to initiate and purchase parking sessions. In four clicks, the parker will start a session, identifying the zone, space number, and duration of the parking session. To streamline this experience further, all clicks occur on the same main page, with the exception of one: the confirmation. Prior to completing their purchase, the parker will be asked to confirm the session and the itemized charges, including parking and convenience fees. The parker will have the option of adding means of payment including a debit or credit card, PayPal account, Apple Pay, Android Pay, Visa Checkout, or a dedicated wallet. If the parker adds more than one payment method, they will be asked to select a default payment, which may be changed at any time, but which will streamline the initiation process. After the session has been started, the parker will be able to track when their session expires, receive a notification at a custom-set time prior to expiration, see a map of where their car is parked, and extend their session remotely without incurring additional convenience fees.

While Apple and Android control 98.2% of the smartphone market<sup>6</sup>, there are still 1.8% of the population who will not be able to download the native application in the Google Play or Apple App stores. To accommodate these users, Passport has developed a mobile optimized companion website, which mimics the Passport Parking application. This website is accessible on any internet-connected device and provides the same user experience, allowing parkers to initiate and purchase a parking session. This website is also a convenient way for parkers to manage their account from laptops or desktop computers.

If the parker doesn't have a smartphone at all, is impaired, or prefers not to use applications, Passport also offers an interactive voice recognition service (IVR). The IVR system allows the parker to call a toll-free number and use the number pad to access their account, enter the zone number, space number, duration, and payment information. Similar to the application, at the end of the process the parker will be asked to confirm their purchase and have both the parking and convenience fees clearly communicated to them. After initiating a session, the parker will call back into the IVR system and extend their parking session.

Accompanying Passport Parking is Passport's backend system: Operator Management ("OpsMan"). OpsMan will become the main analytics dashboard for the City's parking management in addition to being the control board for parking operations. OpsMan aggregates data from all front end interfaces (native application, mobile-optimized website, and IVR system), which is accessible in real time for enforcement, analytics, and management. Included in OpsMan is Passport's Rate Builder 2.1, which is able to handle the most complex rates imaginable. Rate Builder 2.1 powers **over 600 combined rates** in Chicago, Toronto, and with Vancouver's EasyPark mobile payment systems and recently was upgraded to enable demand-based pricing, directly controlled by the City. All data will be easily accessible, digestible, and manipulable for the City's exact needs.

In addition to providing the Passport Parking platform, Passport is also a payments company, allowing it to facilitate all payment processing. As a merchant processor, Passport handles the electronic payment transactions for the City. Passport will obtain sales information from the application, receive authorization and funds from the issuing banks, and send payment to the City. Passport is on the national registries of both Visa and Mastercard as a merchant service provider and undergoes annual PCI-DSS compliance audits.

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<sup>6</sup> Sarah, Perez, *iOS and Samsung market share now tied in the US*, TechCrunch, October 13, 2017, <https://techcrunch.com/2017/10/13/ios-and-samsung-market-share-now-tied-in-the-u-s/>



As a merchant processor, Passport also offers gateway services, which can either be bundled with its merchant processing services or used in conjunction with the City's existing merchant processor. Gateways are an e-commerce application service that authorizes payments between the City and the parker. Gateways enable the City to process multiple transaction types (credit cards, debit cards, PayPal, ACH, Apple Pay, Android Pay, etc...) in real time. The gateway also offers protection by encrypting credit card data. Passport's gateway services tokenize the credit card data and transfer it using secure socket layers, providing additional security. Passport's gateway facilitates three merchant services functions: authorization, settling, and reporting while limiting fraud. The City may opt to use any of the 15+ gateways that Passport is integrated with, but in order to offer Apple and Android Pay, the City will need to be on Passport's gateway and must use a compatible merchant processor.

## USER EXPERIENCES

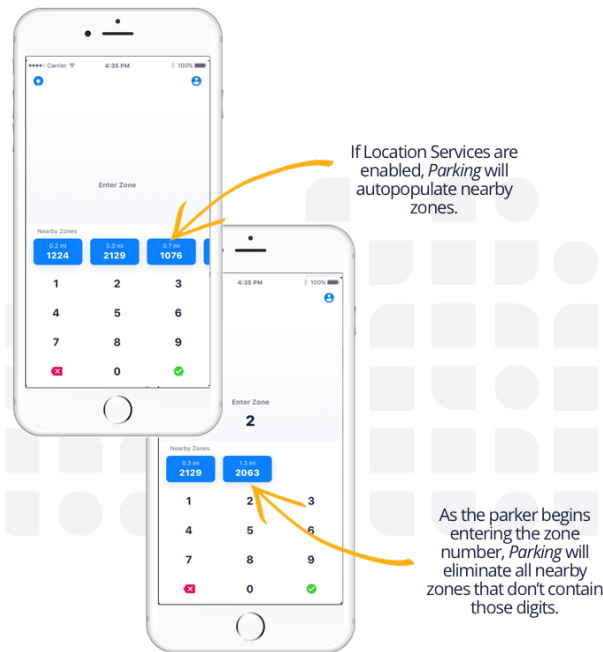
### Passport Parking

Once the parker registers for an account, she will be ready to begin her first parking session. Passport revamped its user flow with Passport Parking adding shortcuts at each step, which streamlines the user experience and makes the process much more enjoyable. Depending on whether the City operates as an LPN-based or space-based environment, starting the first Passport Parking session takes only five steps:

**Enter Zone:** During implementation, Passport will divide the City into zones, the number of which will be determined in consultation with the City and focused on achieving particular goals. Each zone will be assigned a unique number, which will trigger the correct rates for that area in the system. The zone number will be printed on signs throughout the City as well as on a decal, which will be affixed to each parking meter.

If the parker has location services turned on, Passport Parking will suggest nearby zones for the parker to easily select. The parker may either select the pre-populated zone or enter the full zone if they feel so inclined. Regardless of whether location services are turned on, the Zone Selection tool is dynamic in that it will filter through all possible zone numbers and eliminate zones based on each digit entered by the parker. For instance, if the parker is in zone 2041 and begins to type in "2," the system will remove all zones that don't begin with the number "2." As each subsequent digit is entered, the system will continue eliminating zones until the parker sees their zone in the pre-populated list or enters the full zone number. Having such a dynamic offering diminishes the opportunity for the parker to mistype the zone number, only being able to choose from actual zones within the Passport system.





Either:

**Enter Space:**

Once the zone is selected, the parker will enter their space number. This number will also be clearly marked on the decal affixed to each parking meter. Similar to the dynamic function for entering a zone, available space numbers will be eliminated from the list as the parker enters each digit.

**Select Vehicle:** Once the zone is selected, the parker will select which vehicle he is parking on that day from the list created at registration or may enter a new vehicle. Similar to entering a vehicle at registration, the parker only needs to enter his LPN (or take a picture of it) and the state that issued the license plate. The parker can store as many vehicles as necessary in *Passport Parking*, assign each a unique nickname, and can also assign a unique icon color for each vehicle to make selection easier.





**Select Time:** Passport has revamped its rate engine to accommodate a better time selection experience. From the Select Time screen, the parker can either select from “Quick Times” or a sliding parallax. The Quick Times buttons allow the parker to select the maximum time, minimum time, or 1 hour. If the parker requires a different time period, she can select that by moving the sliding parallax. This slide allows the parker to easily navigate to their time in set increments.<sup>7</sup> If there are increasing parking rates tied to specific times of day or the number of hours parked, these will be clearly defined above the sliding parallax.

**Add Payment:** The first time the parker uses Passport Parking to start a session, she will be required to enter payment information prior to confirming the session. Passport accepts payment in the form of credit and debit cards, PayPal, dedicated wallet, and Apple and Android Pay.<sup>8</sup> To enter a new credit or debit card, the parker can either manually enter the card number, zip code, and expiration date or she can take a picture of the credit card with her smartphone. This will capture the credit card number and expiration date. Then, the parker only needs to enter the zip code for payment. All cards can be given a unique nickname to easily distinguish between multiple cards, such as corporate and personal.

If the parker only has one payment method stored, this will be her default payment method for all future sessions. However, if the parker has multiple payment methods stored, she will have the option to designate one method as the “default.” Default payment settings can be changed at any time, including on the confirmation page.

**Confirm Session:** Once the parker has selected the zone, space number of vehicle, duration, and added payment, Passport Parking requires that she confirm the session. The confirmation page clearly shows the location, zone number, space number or selected vehicle, start time, end time, parking fee, convenience fee, total charged, and payment type. If the parker has a validation code, she may enter this now or at any point during the parking session.

Once the parker has started her session, she will be brought to the Active Session page. From this page, the parker will have a map showing where her car is parked and the end time of her parking session. The Active Session screen is the parker’s main dashboard once the session has been initiated, allowing the parker to add time, set up receipts, see an estimate of the time it would take to get back to the car from the parker’s current location, and have a complete breakdown of all transaction details. Further down on the screen, the parker can also see any parking rules for that zone as well as hourly rates based on the time of day and pictures of the zone, if available.

As the session nears its end time, the parker will receive a notification from Passport Parking. The notification will show up in the parker’s notifications page on their smartphone, reminding the parker that the session ends in 15 minutes.<sup>9</sup>

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<sup>7</sup> Increments will be customized and configured to the City during implementation.

<sup>8</sup> In order to implement Apple and Android Pay, the City must use Passport as their Gateway provider and have a merchant processing service that is compatible with these electronic wallets.

<sup>9</sup> Timing of notifications is customizable by the parker.



## OpsMan

The City will have complete control over who may access the backend system and even control what functions and reports can be accessed based on the role or individual within OpsMan. The City will have at least one main administrator, who will manage all other accounts including account creation, access control, and password resets. The City may designate whomever it wants to serve as a Main Administrator, but that person will have complete access to the entire system and so should be someone in a position of trust.

During implementation, Passport will work with the City to determine who should be an administrator (or main administrator) and what levels of access each role or individual should have. Once this is agreed upon, Passport will setup all administrator and provide a list of usernames and passwords for each administrator. Once logged in, the administrator will change their password to something unique and secure. After implementation, the Main Administrator will have access to reset administrators' passwords and adjust access to reports and dashboards, as needed.

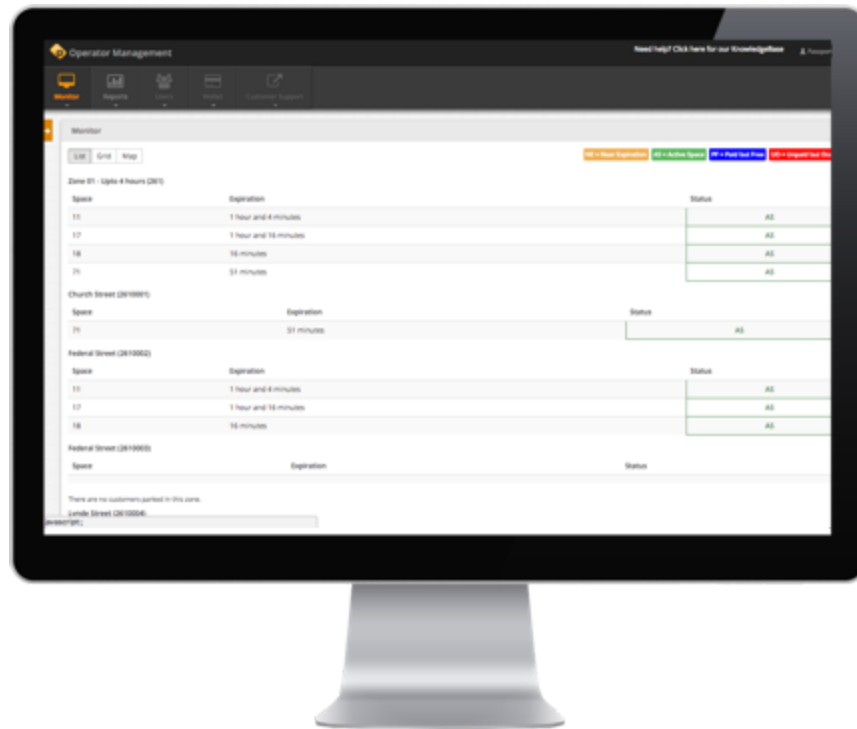
## Login

Administrators will go to <https://ppprk.com/apps/opsman> to access the OpsMan. From there, they will use their unique username and assigned password to login. On the first login, the administrator will be prompted to change their password to a secure alphanumeric password. The default configuration is an eight character password containing one numeric character, though this can be customized by the City to require a specific length, special characters, numbers, upper and lower case requirements, and a set expiration date. Once logged in, the administrator will have a main toolbar that will help them to easily navigate through the portal. The number of available tabs on the toolbar will be dependent on the number of Passport products purchased by the City. Assuming just Passport Parking was purchased, the administrator will see five tabs: Monitoring, Reports, Users, Wallet, and Customer Support.



## Monitoring

Clicking on "Monitoring" will open a page with all zones selected for the City. The screen shows, within each zone, all live sessions. For each session, there will be the space number (or LPN), how much time is left on the session, and the status. The status will be either NE for Near Expiration, AS for Active Space, PF for Paid by Free, and UO for Unpaid by Occupied. Using filters, the administrator will be able to focus on a specific zone or set of zones, as needed. This tool is particularly helpful where the City's parking enforcement software does not have connectivity and the enforcement officer needs to verify a parking session.

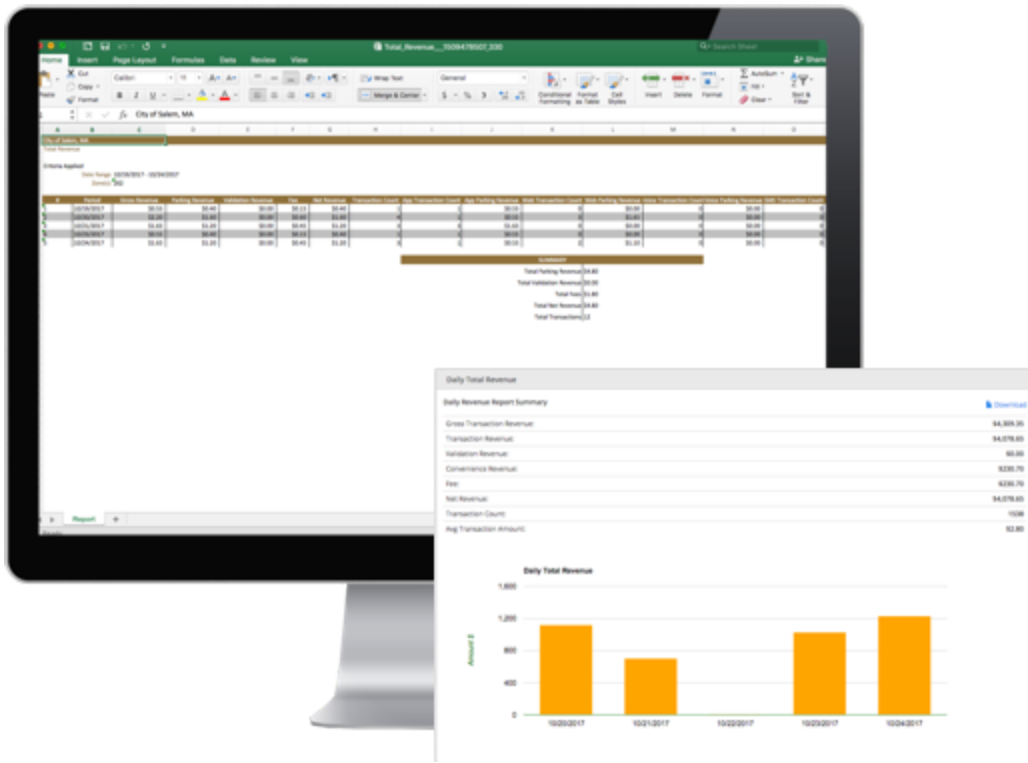


## Reports

The Reports tab allows the administrator to run predefined, ad hoc, and custom reports on the data collected by Passport Parking. Passport Parking aggregates all data related to paid parking sessions and available integrations within the City's parking operations. OpsMan comes preloaded with financial, event, user, and administrative reports, though all reports and raw data may be exported to Excel for further analysis.

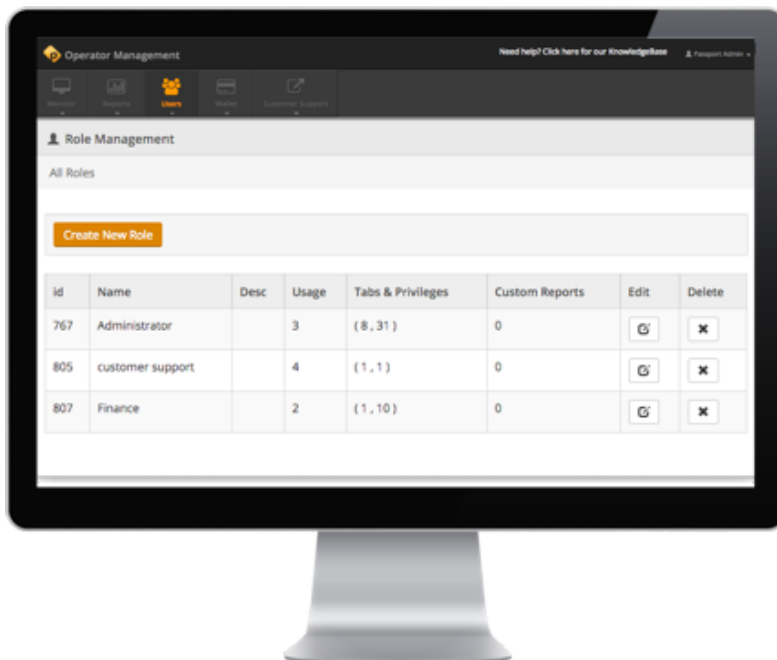
Using the Reports tab, the administrator will be able to select a predefined report, such as Daily Total Summary. Using filters, the administrator will select the zone or zones as well as the relevant dates. After clicking "Submit" OpsMan will return a report with a line-item summary at the top and a bar graph below. The summary will tally up the total Gross Transaction Revenue, Transaction Revenue, Validation Revenue, Convenience Revenue, Fee, Net Revenue, Transaction Count, and Average Transaction Amount for the time period selected. The bar graph will show the daily revenue collected. By hovering over a particular bar within the graph, a popup box will show the total revenue and number of transactions for that day. When downloaded to Excel, this report breaks down the data in the initial summary by day for further analysis.

Passport is constantly iterating and updating its products, including the reporting functions in OpsMan. If the City requires a report that is not already created, Passport will work with the City to develop that report and, if it provides utility to other clients, will make the report available to other clients. Similarly, if other clients request a report with high utility, it will be made available to the City through regular updates.



## Users

Clicking on “Users” will return a drop down menu with “Roles” and “Users.” “Users” is only accessible to a Main Administrator and will be used to create a user, edit access to OpsMan, reset a password, or delete an account. The Main Administrator can filter based on the Role or search for an individual administrator.



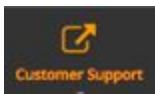
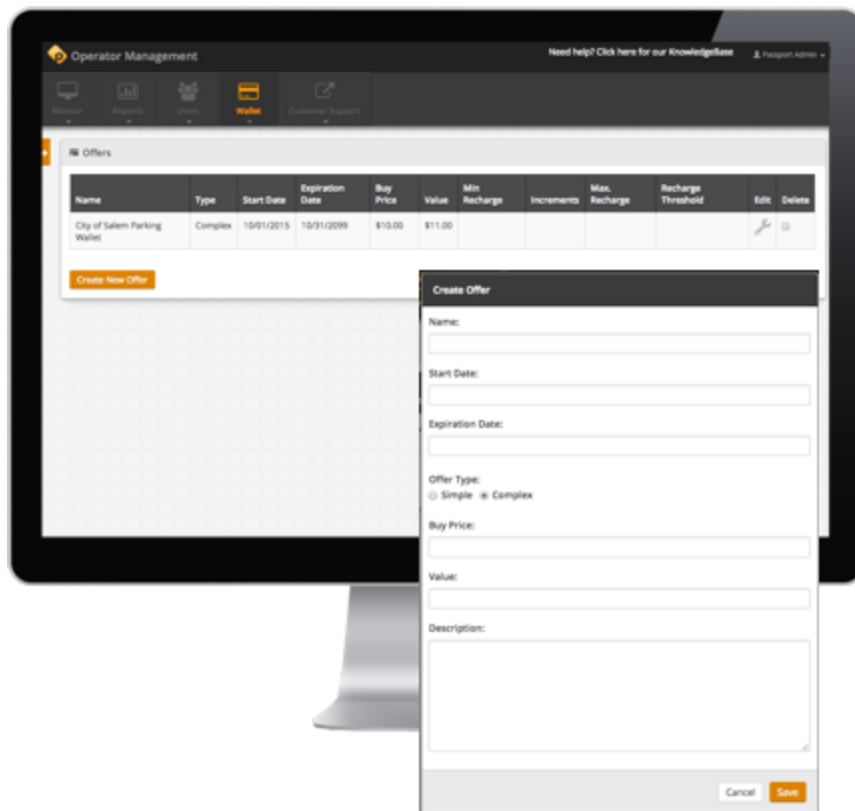


The “Roles” page allows the Main Administrator to change OpsMan access for an entire role. During implementation and thereafter in account creation, the Main Administrator will assign a role to each user. Based on those roles, the Main Administrators can set access controls. Commonly defined roles include “Accounting” and “Customer Support.”



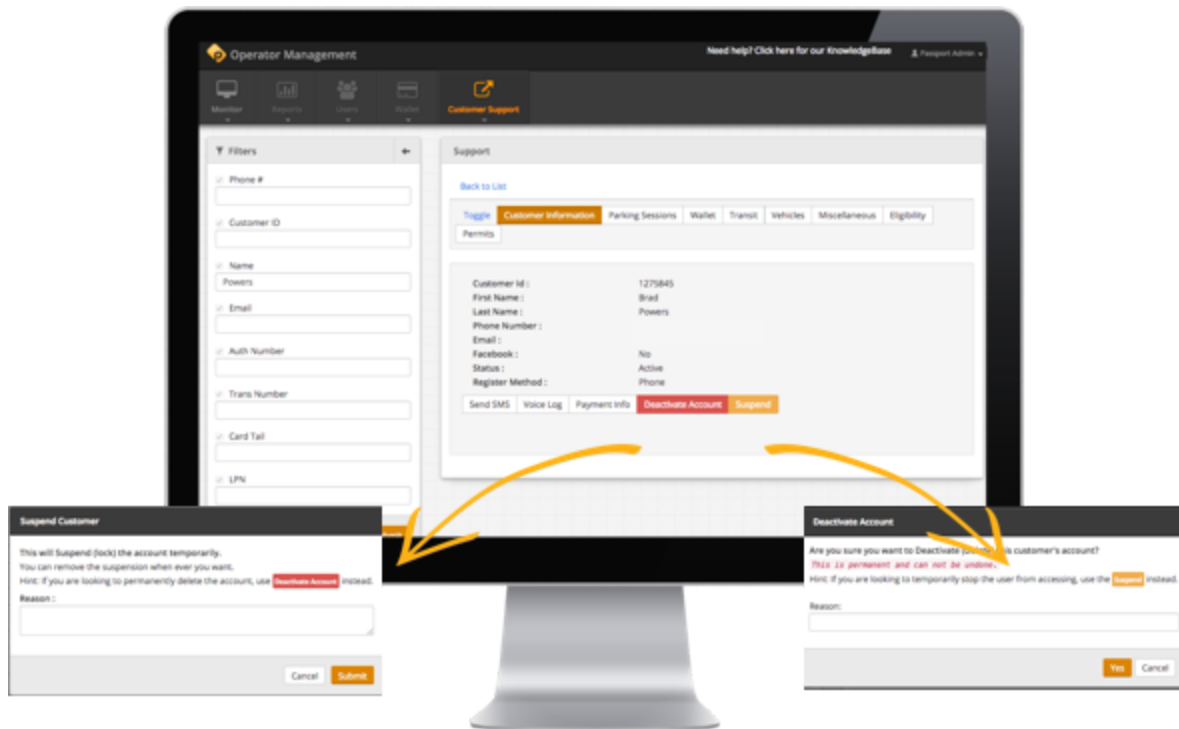
## Wallet

The Wallet tab allows administrators to create wallet offers. To create a new wallet offer, the administrator will click on “Create New Offer,” which opens a dialogue box with various text boxes. To create the offer, the administrator must name the offer, set a start and expiration date, determine whether the offer is simple or complex, assign a value, select a recharge threshold and maximum. Once the offer is created, parkers will be able to purchase a wallet to use for Passport Parking sessions. The complex offer allows the City to offer incentives to use the wallet, such as “buy \$5, receive \$7” for parking sessions to encourage use of the application and the wallet.



## Customer Support

The Customer Support Tab allows administrators to look up a parker’s account by either the phone number, name, email address, transaction number, or LPN. Once the parker is identified, the administrator may pull up that parker’s profile, which will show all customer information, including how the parker registered for their account, whether they have an attached Facebook account, and the phone number and email address used to register.



From the main “Customer Information” section, the administrator will be able to deactivate or suspend a parker’s account based on misuse, fraud, or other business rules. Suspending an account temporarily blocks a parker from using Passport Parking, whereas deactivating the account will permanently delete that parker’s profile. Using tabs at the top of the parker’s profile, the administrator will be able to deep dive into every parking session, wallet transactions, stored vehicles, failed card authorizations, and create a customer service ticket. The administrator will never have full access to the parker’s payment method, only a four digit tail in keeping with PCI-DSS regulations.


## PARKING FEATURES

### Private Label

Passport has continually set the industry standard for the quality and design of parking applications in the United States. In 2014, Passport launched the first third-party private label parking application, ParkOmaha. ParkOmaha, like all of Passports 40+ private label applications is not simply a core application with different colors, branding, and a witty name. Rather, the architecture is built to allow for City-specific rules and messaging, creating a truly unique application.

Passport’s private label products provide brand continuity across all communications, creating a higher level of awareness and increased utilization. The City will work with a Client Lifecycle Marketing Manager to name the application, secure that name, and build an engaging marketing campaign around the City’s newest product offering. Once the name and branding are secured, Passport will design signs and decals in keeping with this branding as well as how-to flyers, and digital banners directing parkers to a fully branded application. The City will have the option to increase marketing efforts throughout the term of the contract, including using guerilla marketing





tactics to generate interest, increase adoption, and encourage continued utilization of the City's application.

The City has complete control over the configuration of its application, including whether the private label application will be interoperable with other Passport Parking clients. For instance, Passport's private label solution ParkBoston can be used interchangeably with Passport Parking, increasing the value of the application as Passport Parking is available in 11 surrounding towns and cities. As every Passport zone number is unique, the City will be able to run reports on zones only within their system's limits, understanding exactly who is using the application, giving increased transparency to all parking operations, and giving the City the necessary data to improve their service offering to its citizens.

### Gated

In gated parking lots and garages, parkers will also be able to use the Passport Parking application. In gated environments, the Passport platform essentially operates as a mobile pay station. The parker will take a ticket and enter the lot as normal. However, instead of taking their ticket with them to either pay on their way out, the parker will take a scan the barcode on the ticket using the camera on their smartphone. Passport's platform will capture all necessary data related to the parking session: time of ingress and hourly rate. The parker will then select their preferred method of payment, which is stored on the application as a 4-digit tail.

When the parker returns to their car, they will insert the ticket into the station at the egress gate. Once the ticket is entered, the gate will open, the selected card will automatically be charged for the appropriate amount, and the parker will receive a receipt on the application, confirming payment.

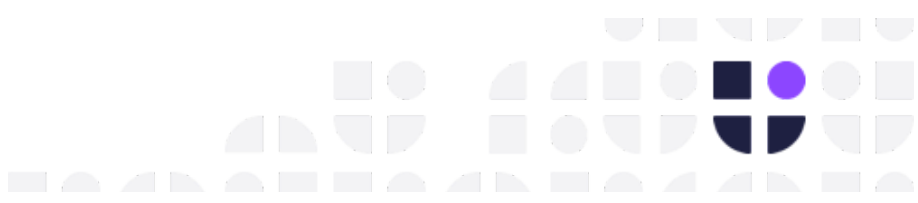
If a local merchant validates parking for that garage, the parker will be able to take full advantage of that benefit through Passport's platform. The merchants will have individual codes that are tied to that individual merchant. When a parker patrons that merchant, the merchant will provide the parker with their unique code. In the "Payment" section of the app, the parker will also have the option of discounting their parking. The parker will then enter the validation code into the application.

The merchant will preload funds into OpsMan, which are held by the merchant of record. When a parker redeems a validation code, that transaction is logged into OpsMan, tagged to the individual merchant. The funds to cover the parking session are then debited from the merchant's prepaid account and paid to the City.

### sPark

sPark is an automated parking experience for registered Passport parkers. This feature allows parkers to park in a garage without having to stop at a pay station. A registered parker's license plate number ("LPN") will be picked up by license plate recognition technology ("LPR") once they enter the garage, which will initiate the session. When the parker leaves and the LPR reader is no longer able to detect the LPN, the session will stop automatically. The parker's registered form of payment will not be charged until after the session is complete.

To register for this program, a parker will save vehicles to their account, by LPN, as well as select a default payment method. When the vehicle enters the garage, the LPR will scan the LPN and run the number against Passport's list of registered parkers. If the LPN is connected to a registered parker, Passport's backend system will confirm the payment method and begin the parking session. The



status of this parking session will be automatically pushed to the enforcement software to ensure accurate enforcement.

To take full advantage of this feature, the City will have to install LPR cameras throughout the non-gated parking garages that it controls so that every parking bay is monitored. Passport integrates with several LPR providers already and will be happy to suggest a provider if the City wishes to purchase new LPRs.

An added bonus of this functionality is targeted enforcement. By utilizing LPR technology within an enclosed space, Passport's system is able to detect exactly where a vehicle is located within the garage. If a parker is not registered with sPark and hasn't otherwise initiated a parking session, Passport can send targeting information to the enforcement software after the City-specified grace period has expired.

### Commercial Zones

Working with Chicago Parking Meters, Passport developed a feature that allows cities to capture revenue from commercial loading zones. Each loading zone is given a unique zone number, similar to the rest of Passport's clients. However, loading zone numbers bring up a different user flow, using different colors to clearly signify that this zone is different. The rules of each loading zone can be customized to the City, however, for ParkChicago these zones have higher rates, are enforced 24/7, and may only be used by commercial vehicles. The UI/UX for these zones is identical to that of Passport Parking: enter zone, select vehicle, select duration, confirm details, begin session. The commercial vehicle may extend parking per the city's rules as well.

### Dynamic Parking Rates

Passport, under the tutelage of its board advisor Keith Chen, strongly believes in the science of Behavioral Economics, which studies the effects of psychological, social, and emotional factors on economic decisions. Applying this to parking, Passport can demonstrate that parkers' behavior can be influenced based on the price of parking. The efficacy of this program, however, will only be as good as the data acquired. Therefore, step one of implementing Dynamic Parking Rates is to acquire data on parking availability by day of the week, month, and year (which Passport Parking does!) as well as public data related to weather, road closures, and citywide events that impact parking. Armed with this data, the City will be able to make data-driven decisions in combination with Passport Parking to change rates in specific zones to influence behavior. Passport can gather this data either through sensors or through community involvement, depending on the City's desired capital outlay.

Once Passport has a complete understanding of where parkers are parking, when, and for how long, the City can begin to change rates to influence specific behavior. For instance, studies have shown that raising rates increases turnover, however, raising parking rates across the board is time consuming and not always the most judicious course of action. Using Passport Parking's historical data and dynamic pricing model, the City will be able to increase rates in specific zones where availability is low or the City has a vested interest in there being open spaces, such as near City government buildings. Being a dynamic system, the City can change rates easily based on the day of the week, whether there is an event that day, and if it is predicted to rain that week. All parking rates will clearly be displayed within Passport Parking as well as the rates in surrounding zones with lower rates, giving the parker enough transparency and forewarning of the rates.

## Merchant Validation

Passport Parking allows local merchants to subsidize parking session of their customers using discount codes. Passport's merchant validation program puts all of the tools necessary to create, manage, and track validations directly into the hands of the merchant, ridding the City of the burden of such management. Within the merchant portal, each merchant will create an account, add a balance, and then generate and distribute validation codes. The validation codes are entered into an existing parking session within Passport Parking, which will subsidize the cost of that parking session. As Passport does not charge the parker's card until the end of the parking session, redeeming a validation code during the session will only reduce the total amount charged to the parker and does not require voids or refunds. Once redeemed, the subsidized amount will be simultaneously deducted from the merchant's account, making the City whole.



DOWNLOAD  
**Parking Kitty**  
TO PAY FOR PARKING

Simply enter the validation code  
after parking and get your  
discount. Good for one  
time use only.

**ParkingKitty.com**

Terms and Conditions may apply.  
No cash value except where required by law.  
Limited to first 500 redemptions.

**\$2.00**

**OFF YOUR PARKING**

1. Download **Parking Kitty**-  
it's free
2. Start a parking session, select  
**Session Options**, then select  
**Discount** to activate your  
validation code below:

**503503**

## Parking Tariffs

In keeping with its commitment to the environment, Passport has developed a feature that allows cities to either discount or surcharge vehicles based on their emissions. This feature can be used to give discounts to motorcycles or electric vehicles or charge a parking tariff on cars with increased emissions, like diesel engines. In order to implement this feature (either in specific zones or city-wide), the environment will be configured to be LPN-based. Through an integration with the DMV, Passport will check the data on file with the DMV (vehicle make, model, year, etc...) against its algorithm. If the vehicle meets specific, objective rules, then the parking rate will increase (or decrease) accordingly. This feature is currently available in Westminster, UK, where there is a 50% surcharge when parking a diesel vehicle manufactured after 2015.

## Reservations

Passport does not currently offer reservations as a value added service, believing rather that reservation companies are better equipped to handle this function. To that end, however, Passport has begun conversations with leading providers, such as SpotHero or ParkWhiz and is ready to build the integration, should the opportunity arise. Whether to offer reservations is a decision that should be made by each City individually as it does have both good and bad aspects to it. The integrated offering may encourage more utilization of the Passport Parking application and may reduce congestion on city streets by pushing parkers to off-street lots. However, there is a potential conflict of interest regarding the split of revenue between private operators and the City when a parker uses



a City application to park in a private lot. Regardless of how the City chooses to handle this situation, Passport is available for consultation and happy to build the integration, should it be deemed the best solution.

# FEE PROPOSAL



Year 1 Fees		
Description	Cost to City	Notes
Per Ticket written	\$1.30	
Per Letter or Notice Sent	\$1.30	Includes DMV lookup, Postage, Envelope, Paper, Labor. Up to 2 letters sent per violation for "primary" collections.
System Setup	\$24,550	Includes all necessary hardware and system provisioning.
Replacement Hardware	\$1,250 per Enforcement Kit	Enforcement Kit includes a configured Zebra ZQ320 printer with charger, battery, one roll of paper, shoulder strap, Samsung Note 7 (Android), rugged phone case, phone charger and a phone screen protector, one year warranty. Individual hardware components: \$900/printer and \$350/Android
Smartphone Data Plans	Not Included	To be sourced through the City's cell phone carrier, unless otherwise requested by the City.
Lockbox Management Services	Included	Up to 10K payments processed annually
Integrations	Included	
Training	Included	
Maintenance	Included	
Hosting	Included	
Digital Permitting Platform	\$19,800	Annual Fee (up to 40K permits annually)
Custom Paper Stock	\$4.85 per roll	Order of 500 rolls, with approximately 66 tickets per roll. Cost will be incrementally higher if order is less than 500 rolls (Example: \$12.25 per roll for order of 100 rolls).
Merchant Processing	2.4% + \$0.25	Per Credit or Debit Card transaction processed by Passport as Merchant of Record. If the City elects to be Merchant of Record, this fee is Not Applicable.
Description	Cost to Violator	Notes
Per Ticket Paid Online	\$3.00	Paid by the Violator (Online, Mobile, IVR), does not include Merchant Processing Fees listed above.
Description	Optional	Notes
Collections Revenue Share	28%	Any Legacy ("Harvester") or "Secondary" Collections (after 2 penalties added and 2 letters sent) performed at the request of the City.



Year 2 Fees		
Description	Cost to City	Notes
Per Ticket written	\$1.30	
Per Letter or Notice Sent	\$1.30	Includes DMV lookup, Postage, Envelope, Paper, Labor. Up to 2 letters sent per violation for "primary" collections.
Replacement Hardware	\$1,250 per Enforcement Kit	Enforcement Kit includes a configured Zebra ZQ320 printer with charger, battery, one roll of paper, shoulder strap, Samsung Note 7 (Android), rugged phone case, phone charger and a phone screen protector, one year warranty. Individual hardware components: \$900/printer and \$350/Android.
Smartphone Data Plans	Not Included	To be sourced through the City's cell phone carrier, unless otherwise requested by the City.
Lockbox Management Services	Included	Up to 10K payments processed annually
Integrations	Included	
Training	Included	
Maintenance	Included	
Hosting	Included	
Digital Permitting Platform	\$19,800	Annual Fee (up to 40K permits annually)
Custom Paper Stock	\$4.85 per roll	Order of 500 rolls, with approximately 66 tickets per roll. Cost will be incrementally higher if order is less than 500 rolls (Example: \$12.25 per roll for order of 100 rolls).
Merchant Processing	2.4% + \$0.25	Per Credit or Debit Card transaction processed by Passport as Merchant of Record. If the City elects to be Merchant of Record, this fee is Not Applicable.
Description	Cost to Violator	Notes
Per Ticket Paid Online	\$3.00	Paid by the Violator (Online, Mobile, IVR), does not include Merchant Processing Fees listed above.
Description	Optional	Notes
Collections Revenue Share	28%	Any Legacy ("Harvester") or "Secondary" Collections (after 2 penalties added and 2 letters sent) performed at the request of the City.



Year 3 Fees		
Description	Cost to City	Notes
Per Ticket written	\$1.30	
Per Letter or Notice Sent	\$1.30	Includes DMV lookup (for any state), Postage, Envelope, Paper, Labor. Up to 2 letters sent per violation for "primary" collections.
Replacement Hardware	\$1,250 per Enforcement Kit	Enforcement Kit includes a configured Zebra ZQ320 printer with charger, battery, one roll of paper, shoulder strap, Samsung Note 7 (Android), rugged phone case, phone charger and a phone screen protector, one year warranty. Individual hardware components: \$900/printer and \$350/Android.
Smartphone Data Plans	Not Included	To be sourced through the City's cell phone carrier, unless otherwise requested by the City.
Lockbox Management Services	Included	Up to 10K payments processed annually
Integrations	Included	
Training	Included	
Maintenance	Included	
Hosting	Included	
Digital Permitting Platform	\$19,800	Annual Fee (up to 40K permits annually)
Custom Paper Stock	\$4.85 per roll	Order of 500 rolls, with approximately 66 tickets per roll. Cost will be incrementally higher if order is less than 500 rolls (Example: \$12.25 per roll for order of 100 rolls).
Merchant Processing	2.4% + \$0.25	Per Credit or Debit Card transaction processed by Passport as Merchant of Record. If the City elects to be Merchant of Record, this fee is Not Applicable.
Description	Cost to Violator	Notes
Per Ticket Paid Online	\$3.00	Paid by the Violator (Online, Mobile, IVR), does not include Merchant Processing Fees listed above.
Description	Optional	Notes
Collections Revenue Share	28%	Any Legacy ("Harvester") or "Secondary" Collections (after 2 penalties added and 2 letters sent) performed at the request of the City.





Annual Extension Fees		
Description	Cost to City	Notes
Per Ticket written	\$1.30	
Per Letter or Notice Sent	\$1.30	Includes DMV lookup, Postage, Envelope, Paper, Labor. Up to 2 letters sent per violation for "primary" collections.
Replacement Hardware	\$1,250 per Enforcement Kit	Enforcement Kit includes a configured Zebra ZQ320 printer with charger, battery, one roll of paper, shoulder strap, Samsung Note 7 (Android), rugged phone case, phone charger and a phone screen protector, one year warranty. Individual hardware components: \$900/printer and \$350/Android.
Smartphone Data Plans	Not Included	To be sourced through the City's cell phone carrier, unless otherwise requested by the City.
Lockbox Management Services	Included	Up to 10K payments processed annually
Integrations	Included	
Training	Included	
Maintenance	Included	
Hosting	Included	
Digital Permitting Platform	\$19,800	Annual Fee (up to 40K permits annually)
Custom Paper Stock	\$4.85 per roll	Order of 500 rolls, with approximately 66 tickets per roll. Cost will be incrementally higher if order is less than 500 rolls (Example: \$12.25 per roll for order of 100 rolls).
Merchant Processing	2.4% + \$0.25	Per Credit or Debit Card transaction processed by Passport as Merchant of Record. If the City elects to be Merchant of Record, this fee is Not Applicable.
Description	Cost to Violator	Notes
Per Ticket Paid Online	\$3.00	Paid by the Violator (Online, Mobile, IVR), does not include Merchant Processing Fees listed above.
Description	Optional	Notes
Collections Revenue Share	28%	Any Legacy ("Harvester") or "Secondary" Collections (after 2 penalties added and 2 letters sent) performed at the request of the City.

NON COLLUSION CERTIFICATE

**Non-Collusion Certification – RFP/RFQ**

By submission of this Proposal, each Proposer or person signing on behalf of the Proposer, certifies that to the best of his/her knowledge and belief:

1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with a competitor for the purpose of restricting competition.
2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

**EFFECTIVE: 12/8/05**

# CONTRACTOR'S STATEMENT

## CONTRACTOR'S STATEMENT

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or member:

N/A  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If a corporation, the names and addresses of all officers and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% of the common or preferred stock of said holding company.

Robert Youakim, CEO	Grotech Ventures II, LP	MK Capital II, LP	Bain Capital Venture Fund 2016, LP
128 S Tryon St., Suite 2200	8000 Towers Crescent Dr, Ste 850	40 Skokie Blvd.	632 Broadway
Charlotte, NC, 28202	Vienna, VA 22182	Northbrook, IL 60062	New York, NY 10012

Other officers: Khristian Gutierrez, CRO ; Brad Powers, CTO ; Hunter Louis, CFO ; Michael Scully, CPO ; Igo Karpovich, CCDO

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

N/A  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of

Bidder/Proposer: Khristian Gutierrez

Signature of Bidder/Proposer : 

Title: CRO & Managing Partner

Company Name: Passport Labs, Inc.

Address: 128 S Tryon St., Suite 2200, Charlotte, NC, 28202



# BIDDER CONTRACT COMPLIANCE MONITORING REPORT

## 3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

<p><b>White</b> (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.</p> <p><b>Black</b> (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa.</p> <p><b>Hispanic</b>- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.</p>	<p><b>Asian or Pacific Islander</b>- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa.</p> <p><b>American Indian or Alaskan Native</b>- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.</p>
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## BIDDER CONTRACT COMPLIANCE MONITORING REPORT

### PART I – Bidder Information

<p>Company Name: Passport Labs, Inc.          Street Address: 128 S Tryon St, Suite 2200          City &amp; State: Charlotte, NC, 28202          Chief Executive: Robert Youakim</p>	<p>Bidder Federal Employer          Identification Number: 46-4987364          Or          Social Security Number:</p>
<p>Major Business Activity:          (brief description)          Mobile Payment Applications for the Parking, Transit, and Tolling Industries.</p>	<p>Bidder Identification          (response optional/definitions on page 1)</p> <p>-Bidder is a small contractor? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>-Bidder is a minority business enterprise? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>          (If yes, check ownership category)          Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian American <input type="checkbox"/>          American Indian/Alaskan Native <input type="checkbox"/> Iberian Peninsula <input type="checkbox"/>          Individual(s) with a Physical Disability <input type="checkbox"/> Female <input type="checkbox"/>          -Bidder is certified as above by State of CT? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>Bidder Parent Company: N/A          (If any)</p>	
<p>Other Locations in CT: N/A          (If any)</p>	

### PART II - Bidder Nondiscrimination Policies and Procedures

<p>1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 &amp; 4a-60a Conn. Gen. Stat.?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>9. Does your company have a mandatory retirement age for all employees?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p>
<p>5. Do you notify the Ct. State Employment Service of all employment openings with your company?          Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor?          Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/></p>
<p>6. Does your company have a collective bargaining agreement with workers?          Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>12. Does your company have a written affirmative action Plan?          Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>          If no, please explain.</p> <p>13. Is there a person in your company who is responsible for equal employment opportunity? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>          If yes, give name and phone number:</p>

Part III - Bidder Subcontracting Practices

(Page 4)

1. Will the work of this contract include subcontractors or suppliers? Yes  No

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes  No

PART IV - Bidder Employment Information

Date: August 27, 2018

JOB CATEGORY *	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE		Does Not Specify
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	
Management *1	9	3	2			1						3
Business & Financial Ops *2	21	11	5					1				4
Marketing & Sales *3	105	44	30	6	2	5	2	5	2			8 1
Legal Occupations *4	12	6	2	2								1 1
Computer Specialists												
Architecture/Engineering												
Office & Admin Support												
Bldg/ Grounds Cleaning/Maintenance												
Construction & Extraction												
Installation, Maintenance & Repair												
Material Moving Workers												
Production Occupations												
<b>TOTALS ABOVE</b>	<b>147</b>	<b>64</b>	<b>39</b>	<b>8</b>	<b>2</b>	<b>6</b>	<b>2</b>	<b>6</b>	<b>2</b>			<b>16 2</b>
Total One Year Ago	unknown											
FORMAL ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)												
Apprentices												
Trainees												

\*NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

- \*(1) Executive/Senior Level Officials and Managers
- \*(2) First/Mid-Level Officials and Managers
- \*(3) Professionals
- \*(4) Sales Workers






**PART V - Bidder Hiring and Recruitment Practices**

(Page 5)

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)				2. Check (X) any of the below listed requirements that you use as a hiring qualification		3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination
SOURCE	YES	NO	% of applicants provided by source	(X)		
State Employment Service	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Work Experience	Passport recruitment team creates "challenges" that are used to test performance of possible hires such as coding for developer positions.
Private Employment Agencies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6%	<input checked="" type="checkbox"/>	Ability to Speak or Write English	
Schools and Colleges	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Written Tests	
Newspaper Advertisement	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	High School Diploma	
Walk Ins	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	College Degree <small>For some jobs</small>	
Present Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20%		Union Membership	
Labor Organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Personal Recommendation	
Minority/Community Organizations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0		Height or Weight	
Others (please identify)	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Car Ownership	
online job boards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	56%	<input checked="" type="checkbox"/>	Arrest Record	
company site	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18%		Wage Garnishments	

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN GEN STAT.

(Signature) 	(Title) CRO & Managing Partner	(Date Signed) 8-28-18	(Telephone) (704) 837-8066
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## APPENDIX A: DISASTER RECOVERY PLAN

Passport will provide the Software with **uptime of at least ninety-nine percent (99%)** calculated over a rolling six-month period (“Uptime Guarantee”). For any month during which system uptime drops below the Uptime Guarantee, Passport will provide a billing credit in an amount equal to: the percentage difference between a) the lowest uptime reached at any point during the month (calculated on a rolling six month period) and b) the Uptime Guarantee multiplied by the total fees payable to Passport for such month. For example, if during a given month the Software uptime fell as low as ninety-five percent (95%) and during that month, the fees payable to Passport were one hundred dollars (\$100.00), Passport would issue a billing credit of four dollars (\$4.00). For the purposes of this Agreement, Uptime is defined as any period of time during which end users of the Software can use the Software to pay for parking, pay for mobile tickets, or issue parking citations, as applicable.

To monitor, troubleshoot, and fix any errors or interruptions, the City will contact its Product Support Specialist, who will work with the software engineers to resolve the issue as quickly as possible and train any administrators in how to use the product most effectively. This support is available 24 hours a day, seven days a week. Depending on the severity of the issue, Passport will respond as follows:

Priority	Elements	Support Response
<b>Priority 1 – Critical Problems:</b>	<p>Marked by problems that:</p> <ul style="list-style-type: none"> <li>• Crash the system completely;</li> <li>• Corrupt data;</li> <li>• Cause major functions or features to fail to operate; or</li> <li>• Otherwise significant, material, and substantive.</li> </ul>	<p>Passport will provide an error notice for such problems <b>within fifteen (15)</b> minutes of Provider’s receiving notice of such error and dedicate resources on a continual, best efforts basis to correct the problem within one (1) hour of receipt of the Error Notice. Passport will provide the City status reports every one (1) hour, or more frequently if requested by the City, until the problem has been corrected.</p>
<b>Priority 2 – Medium Impact Problems</b>	<p>Marked by problems that:</p> <ul style="list-style-type: none"> <li>• Cause significant delays or</li> <li>• Cause minor functions or features to fail to operation that is substantive, but not material.</li> </ul>	<p>Provider shall provide an Error Notice for such problems within one (1) hour of Provider’s receiving notice and shall work during normal business hours and use reasonable commercial efforts to correct the problems within six (6) hours of receipt of the error notice. Passport will provide the City status reports every one (1) hour, or more frequently if requested by the City, until the problem has been corrected.</p>





**Priority 3 – Low  
Impact Problems**

Marked by problems that:

- Cause minor delays, but
- Do not inhibit the ability to use the service and are neither substantive nor material.

Passport will provide an error notice for such problems within one (1) hour of Provider's receiving notice and shall work during normal business hours and use reasonable commercial efforts to correct the problems within one (1) day of receipt of the error notice. Passport will provide the City status reports every one (1) hour, or more frequently if requested by the City, until the problem has been corrected.

## APPENDIX B: RESUMES

# Conor Kelly

## Regional Sales Director

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### **Passport, Regional Sales Director**

April 2014 - Present

- \* Led a sales team to develop relationships and sell Passport's suite of mobile applications throughout the north eastern United States and Canada.
- \* Managed government and university procurement processes, including leading shortlist presentations for mobile payment for parking and transit, citation management, and digital permitting technologies.
- \* Partnered with other software and hardware providers to deliver best-in-class products and service to municipal, private, and university clients.

#### **Accomplishments**

- \* Spearheaded Passport's Canadian expansion by securing a contract with the Société Parc-Auto du Québec (SPAQ), which owns more than 47,000 parking spaces in Québec.
- \* Worked extensively with Detroit stakeholders, including Mayor Dugan, on revamping the Detroit Parking ecosystem.

### **Blue ID, Co-Founder & Sales Manager**

January 2013 - Present

- \* Analyzed the strengths, weaknesses, opportunities, and threats of the collegiate athletics and computer design agencies to develop a target demographic and business strategy.
- \* Developed and managed a sales territory based on the research and analysis conducted while developing the company.

### **Under Armour, Footwear Sales Coordinator**

July 2011 - January 2013

- \* Coordinated all phases of account management with customer service and sales support related to orders, products, and shipments to national distributors and direct consumers.
- \* Prepared sales and forecasting reports based on current and historical data.

### **Under Armour, Customer Service Representative**

June 2010 - July 2011

- \* Displayed superior effort in handling and troubleshooting all customer issues with high efficiency on a daily basis through excellent listening and problem solving skills.
- \* Exceeded all performance objectives and metrics set in scorecards by using an innovative approach to obtaining new sales and maintaining current customers.

### **Bank of America, Analyst**

September 2009 - April 2010

### **MaxPreps, Associate Territory Manager**

August 2006 - May 2008

### **East Carolina University, Greenville, North Carolina**

May 2008

#### **B.S., Economics**



# Mike Mohler

## Project Manager

**Passport, Project Manager** August 2016 - Present

\* Managed the entire implementations process, including initial client meeting, systems set-up, application development, quality assurance, marketing, and post-launch initiatives.

\* Responsible for the implementation of more than 30 deals of various sizes, including custom implementations for the University of Illinois and Albany, NY.

\* Leveraged experience as a former Passport client to improve the onboarding process to be more user-friendly.

**City of New Haven, Deputy Director, Transportation, Traffic, and Parking** July 2013 - August 2016

\* Maintained a viable and sustainable transportation system for the City of New Haven through working with vendors, contractors, and various departments at both the local and state level.

\* Coordinated operations with the six divisions within the department's umbrella.

\* Oversaw all customer service and front office operations, including managing the budget and controlling all personnel and HR related issues.

\* Directly supervised all on-street parking related matters for the City, including enforcement, appeals, and adjudication processes and the management and collection of revenue.

\* Managed the implementation of new processes and systems, including revamping the enforcement program hardware and software to utilize Passport technology and be more user and customer friendly.

**Stop & Shop, Store Opening Specialist** August 2012 - June 2013

**Stop & Shop, Assistant Store Manager** September 2010 - August 2012

**Self Employed, Freelance Graphic Designer** January 2003-June 2013

**Southern Connecticut State University, New Haven, Connecticut** 2000-2004

### B.S., Graphic Design

Minor, Computer Science

### Certifications

Passport Parking Client Advisory Board, Inaugural Member May 2016 - August 2016

New England Parking Council March 2015 - Present

PIE Conference Panelist, Technology in the Parking Industry March 2014

Trolley Car Restoration Eagle Project

Boy Scouts of America Eagle Scout Community Service Project

Developed a plan and coordinated the first stage of a full restoration project for the historic trolley used by East Haven as a welcome center and icon for the town.

# Michael Rafferty

## Enterprise Implementations Architect

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### **Passport, Enterprise Implementations Architect**

April 2014 - Present

- \* Developed the process by which Passport implements its products in municipal, collegiate, and private parking environments across North America.
- \* Led the implementation of the Mobile Payment for Parking product for the city of Boston in under 60 days, including Christmas, Hanukkah, and New Year's.
- \* Managed the ParkChicago account, speaking with a representative of Chicago Parking Meters on a daily basis to best serve the client and ensure the most efficient use of the application and backend system.

### **Wells Fargo Securities, Derivatives Marketing Associate**

June 2011 - March 2014

- \* Structured and executed OTC and cleared interest rate derivative transactions including plain vanilla swaps, cross-currency swaps, caps, floors, swaptions, and LIBOR and Treasury based forwards.
- \* Assisted clients in managing the interest rate exposure of the liability side of their balance sheet with synthetic fixed or floating rate debt.
- \* Reviewed quarterly and annual public filings of companies included in the S&P 500 Index and Dow Jones Industrial Average to create sector based fixed-floating debt mix analysis.

### **Bank of America Merrill Lynch, Global Wealth Management Intern**

August 2009 - December 2009

- \* Constructed the optimal asset allocation for the portfolios of individual clients by using client specific information as well as Merrill Lynch proprietary research.
- \* Learned sales skills and developed the ability to explain investment strategies to clients.

### **Integra FX, Foreign Exchange Trading Intern**

May 2009 - June 2009

### **Integra Investment Management, Foreign Exchange Trading Intern**

May 2008 - August 2008

### **University of Florida, Gainesville, Florida**

May 2011

#### **B.S., Finance**

summa cum laude  
Minor: Statistics, Actuarial Science  
GPA: 4.00/4.00  
Scholarship Awards:  
Warrington Finance Scholar  
CFA Institute Scholarship for College Students  
Bright Futures Academic Scholarship

#### Certifications

Chartered Financial Analyst (CFA) Level III, candidate



# Christopher Watt

## Client Success Manager

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**Passport, Client Success Manager** 2014 - Present

- \* Main point of contact for all mobile pay for parking, citation management, and digital permitting clients for the term of the contract.
- \* Managed the implementation process of Passport's suite of products by serving as liaison between the client and the project manager.
- \* Work with clients to find the appropriate solution after learning the nuances of the pain points in the parking or transportation departments.

**TriMark USA, Territory Sales Manager** 2003 - 2014

- \* Responsible for business-to-business sales with local and national clients.
- \* Produced and executed sales presentations in front of senior management to illustrate cost-effectiveness and benefits of TriMark's suite of products.

**Electric Cowboy, Assistant General Manager** 2012 - 2013

- \* Managed a staff of 60 including office managers, security personnel, event planners, and various other roles
- \* Booked local/ regional/ national acts including Eli Young Band, Jamey Johnson, Brantley Gilbert, Eric Church, Zac Brown Band, Trailer Choir, etc.

**Kennesaw State University, Kennesaw, Georgia** 2009

**B.S., Communication and Media Studies**

Delta Tau Delta

Chairman of the Student Fees Committee, Student Government

# APPENDIX C: CASE STUDIES

## Enforcement

by Passport

### New Haven Case Study

Passport helps New Haven with mobile parking and citation management solutions



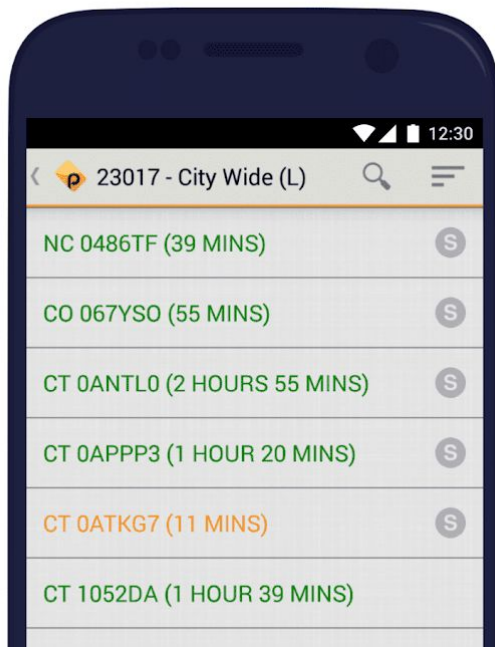
#### BEFORE PASSPORT

New Haven's parking enforcement used offline handheld devices and offered limited payment options to end users. The city also needed customized options to improve efficiencies in the system. New Haven decided to engage Passport to overhaul its platform and implement a real-time software solution.

#### WITH PASSPORT

Through a shared innovation process, over 100 enhancements and changes were made to the citation management platform in New Haven resulting in increased functionality and performance.

A wireless printer syncs to any android device so tickets issued are uploaded to the system in real-time versus an offline system that requires hardware docking.



**18%**  
increase in  
online payments

**4%**  
increase in  
citations issued

**145,000**  
citations issued  
per year

**10%**  
increase in revenue

Passport and the experience and technological insight that they bring to the table has enabled the City of New Haven and our enforcement to become more user efficient and public friendly. The new system allows the officers in the field to do more with less effort, as well as convey more real-time information to the public than ever before.

Former Deputy Director of Transportation, Traffic, and Parking

V0917

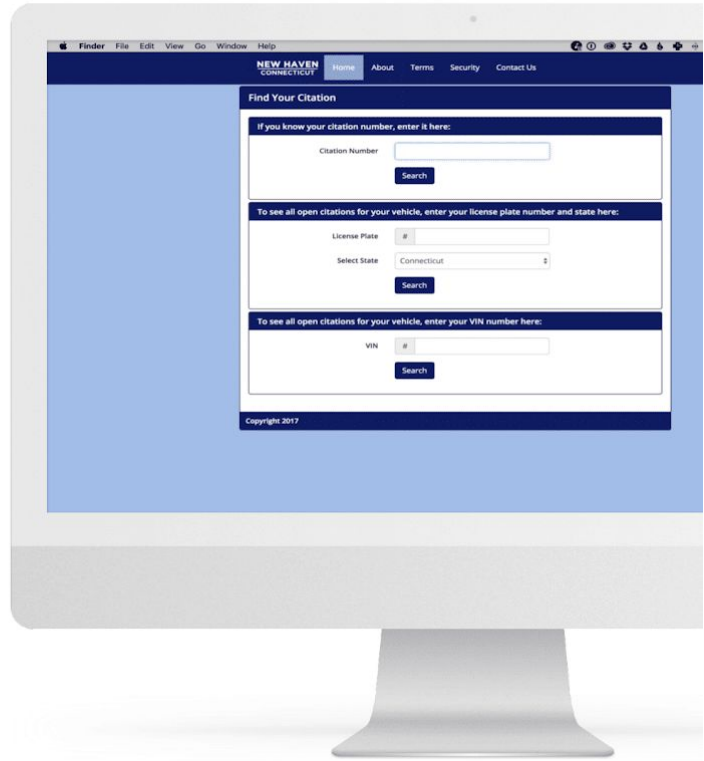




## ONLINE CITATION PAYMENTS

Customers in New Haven were able to take advantage of a real-time branded payment platform, creating the convenience to make citation payments versus having to pay in person or mail-in the payment.

New Haven's online citation platform debuted with many new features that were developed specifically for the city. Working together, a new chalking system was developed, ticket layouts were optimized for an improved customer experience, a refined website was introduced, and a boot/tow portal was created to rapidly streamline yes/no rules on eligibility policies. The combination of back office enhancements and user facing improvements resulted in a successful conversion and enhanced performance for parking enforcement.



## ADDITIONAL FEATURES



Full import of legacy citations



Process for court scheduling and appeals



Customized IVR solution for voice-enabled payments



Integrations with CT DMV, ATS/EHI, Veoci, Yale Asset Works



Work-order feature (report an incident) and integration



Fully responsive client support team

To learn more about our citation management solutions, contact us today.

passportinc.com  
sales@passportinc.com  
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## Portland, ME Case Study

A partnership to streamline and optimize enforcement operations.



Portland, ME is an historic seaside city with a bustling downtown district. The city issues over 130,000 tickets a year and was looking to update its enforcement operations with an integrated, real-time solution that minimized manual work and maximized efficiency. Through a competitive bid process, Portland found a partner in Passport, the leader in mobile solutions for parking and enforcement.

### WITH PASSPORT

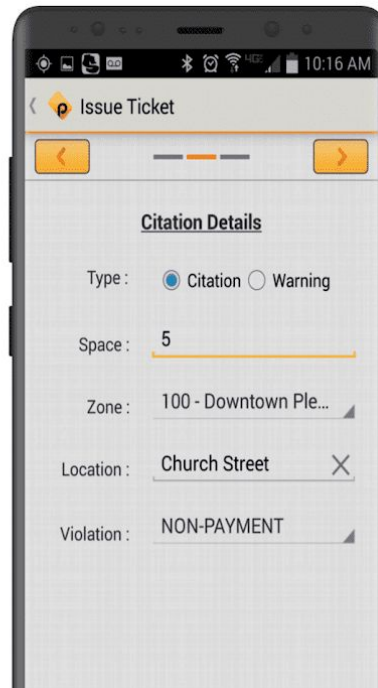
Manual ticket writing, calling to confirm scofflaw violations, and tedious data entry are all a thing of the past for Portland, thanks to Passport's end-to-end enforcement solution.

**120,000**

citations issued per year

### HELLO REAL-TIME DATA

Enforcement officers use Passport's mobile enforcement app to search for vehicle registration information, tickets are issued via a wireless printer, and the data is managed in real time through Passport's back office system. The department can operate more efficiently and offer better customer service when data is processed in real-time.



*The mobile app changes my day in a lot of respects. For example, instead of writing out a long car name like Mitsubishi, it's easy to find [with Passport's in-app search functionality] and goes much faster.*

*Parking Enforcement Officer, Portland, ME*



## STREAMLINED OPERATIONS

With features like fuzzy matching search and drop down selection menus, the ticket issuance mobile app makes the work of inputting data more efficient for officers, and data is more accurate on the back end.

## CUSTOMIZED REPORTS

Portland required specific reporting functionality to service its operations. That included an Officer Route Map to track officer beats in real time, an Officer Activity Chart to track citation issuance activity, and a Ticket Density Heatmap to identify areas of high and low productivity. The culmination of these reports has led to a modern and optimized system for parking enforcement in Portland, that would not have been possible in previous years.



## COMMUNITY CONNECTION

While their priority is enforcing parking ordinances, parking enforcement officers are also expected to serve as the public face of the department. To support this initiative, Portland engages its officers in in house public relations training programs, IPI conflict resolution workshops, a police department training called Verbal Judo, and customer service workshops. With the power of mobile, officers have a more efficient means of issuing tickets, and having efficient operations means they can spend more time focusing on establishing relationships with community members and less time with manual processes.

---

*My initial impression of Passport was how enthusiastic the staff was and their commitment to teamwork...not only do those thoughts still remain, but they have been validated.*

*John Peverada, Parking Manager for Portland*

## PARTNERSHIP & SUPPORT

A dedicated project management, training, and product support team led Portland's enforcement launch, and ensured zero data loss during the system transition. A dedicated Client Success Manager visited Portland in person to provide on-site training to system administrators and enforcement officers.


*My favorite part about the job is being able to walk around and meet up with people. That's the most important thing. I don't just drive around in the truck. Walking around makes you more involved in the job...I have conversations with people, and try to seem friendly so people aren't afraid of me. If I'm friendly, it gives people the impression that parking people aren't so bad.*

*Parking Enforcement Officer, Portland, ME*



To learn more about our partnership and solutions, contact us today.  
passportinc.com | sales@passportinc.com | © 2018 Passport Labs, Inc. All rights reserved.

## APPENDIX D: CHECKALT SERVICES



# Integrated Receivables Solutions

Enhance your treasury management product suite with integrated receivables solutions from CheckAlt

**In-Depth Knowledge**

With over 15 years of experience working with financial institutions and commercial clients across the country, we can help you compete more effectively with a fully integrated suite of receivables solutions designed for industries of all types, including government, real estate, utilities, higher education, non-profits and healthcare.

Select from a broad range of products accessible to your clients through a fully integrated online information portal

### KlikRemit

#### Enhanced Lockbox

Our nationwide hub and spoke capture site model offers a highly portable, flexible and scalable approach to retail, wholesale and whole-tail lockbox processing.

### RemitStation

#### Remote Lockbox

Allows your business clients to use a web-connected PC and desktop scanner to capture payments in their office and transmit them into CheckAlt's Lockbox.

### eKlik

#### Electronic Lockbox

Streamlines the end-to-end electronic fulfillment of consumer-initiated online banking payments by creating the electronic link between consumer and biller.

### KliknPay

#### Electronic Bill Pay & Presentment

Quickly and easily present summary statements online and allow customers to make payments electronically using any payment method, including debit/credit and ACH.





## The Benefits of our Integrated Receivables Solutions

✔ **Keep your brand in front of your customers**

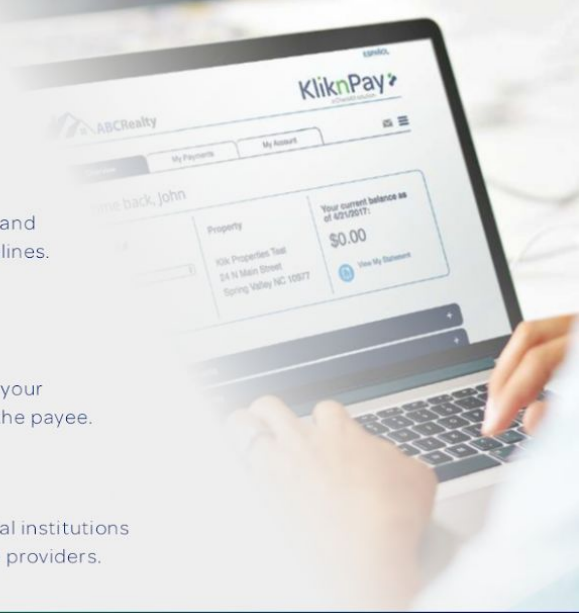
Our receivables products integrate and deliver payments, data and images via a web portal customized to your own branding guidelines.

✔ **Expand your market reach with a nationwide network of 14 lockbox processing sites**

Enter markets where you do not have penetration and improve your customer's cash flow by moving the capture process closer to the payee.

✔ **Highly flexible, fully integrated platform**

Our highly scalable products meet the specific needs of financial institutions and businesses of all sizes and integrate with all major software providers.



## Put Our Experience to Work for Your Financial Institution



Dedicated customer service and relationship management support



Simple on-boarding and implementation process






Integrated web portal, private labeled for your financial institution or business

## About CheckAlt

CheckAlt is the largest independent provider of lockbox and treasury solutions in the country. CheckAlt empowers financial institutions and commercial clients of all sizes with innovative item and payment processing products to efficiently capture and process consolidated payments across all payment channels. With its headquarters in New York, NY, CheckAlt's nationwide network of 14 processing sites moves the capture process closer to the paying customer, shortening the processing window and accelerating revenue recognition.

**Contact Us**

**Shai Stern**      C: (917) 579-3107      sstern@checkalt.com  
 O: (310) 417-1050      www.checkalt.com



# APPENDIX E: CONTRACT EXCEPTIONS

**PLEASE NOTE: THIS AGREEMENT IS PROVIDED AS AN EXAMPLE ONLY. THE ACTUAL CONTRACT SUBMITTED FOR YOUR FIRM'S SIGNATURE WILL VARY BASED UPON THE PARTICULARS OF THE SPECIFIC RFP/RFQ PACKAGE.**

**[Contractor note to City: In the event Contractor is the successful bidder, Contractor presents the proposed revisions to the Agreement in an effort not to waive the right to make contract revisions at a later date. Nevertheless, Contractor remains open to further contract negotiations with the City to reach mutually agreeable contract terms].**

## AGREEMENT

**THIS AGREEMENT** dated the     day of                     , 2010, by and between the **CITY OF STAMFORD**, a municipal corporation in the State of Connecticut, hereinafter referred to as the "City", 888 Washington Boulevard, Stamford, Connecticut 06904, acting herein by DAVID R. MARTIN, its Mayor, hereunto duly authorized, and

hereinafter referred to as the "Contractor", acting herein by  
, duly authorized.

## WITNESS ETH

**WHEREAS**, the City of Stamford solicited Request for   for  
Proposals #     
; and,

**WHEREAS**, the Contractor has responded to the City by submitting a Response to the Request for Proposal; and,

**WHEREAS**, the City has accepted the Contractor's Proposal for said work, pursuant to the terms hereinafter set forth.

## **NOW THEREFORE, THE PARTIES AGREE AS FOLLOWS:**

1     . **SCOPE OF SERVICES.** The scope of services shall consist of those duties, functions, obligations, responsibilities, and tasks set forth in: (a) the City's Request for Proposal#   , attached hereto as Exhibit A and made a part hereof; and (b) the Contractor's Proposal, Exhibit B attached hereto and incorporated herein;

2     . **COMPENSATION.**   The City shall pay as compensation to the Contractor a fee of .....

3.     **TIME OF COMMENCEMENT AND COMPLETION OF WORK.** The Contractor shall commence the work hereunder upon the execution of this Agreement by both parties and shall complete said work in a timely, efficient, and diligent manner. It is agreed and understood that time is of the essence, and that if the Contractor fails to perform the work within the period allowed, the City shall have the right to terminate this Agreement and/or pursue appropriate legal recourse for the Contractor's breach of this Agreement; **provided, however, the City shall notify the Contractor in writing of the failure and provide the Contractor with a reasonable time to cure such failure.**

4. **REVIEW OF WORK.** The Contractor will permit the City, its officers, agents, and employees, to review, at any time, all work performed under the terms of this Agreement at any stage of the work.

5. **INDEMNIFICATION.** The Contractor shall indemnify and hold harmless the City, its officers, agents and employees (the "Indemnified Parties"), from and, if requested, shall defend them against any third party loss, cost, damage, injury, liability, and claim for injury to or death of a person, ~~including employees of the Contractor~~ or loss of or damage to property, resulting directly ~~or indirectly~~ from the Contractor's performance of this Agreement, or by any omission to perform some duty imposed by this agreement upon the Contractor, its officers, agents and employees. The foregoing indemnity shall include, without limitation, reasonable fees of attorneys, Contractors and experts, and related costs and the City's cost of investigating any claims against it. ~~This paragraph shall not be construed to require the Contractor to indemnify the Indemnified Parties for their own negligent acts or intentional acts or omissions or those of third-parties.~~

~~In addition to the Contractor's obligation to indemnify the City, the Contractor specifically acknowledges and agrees that it has an immediate and independent obligation to defend the City from any claim which actually or potentially falls within this indemnification provision, even if the allegations are or may be groundless, false or fraudulent, which obligation arises at the time such claim is tendered to the Contractor by the City and continues at all times thereafter.~~

The Contractor shall indemnify and hold the City, its officers, agents and employees, harmless from all loss and liability, including attorneys' fees, court costs and all other litigation expenses arising out of the Contractor's performance of this Agreement.

6. **ASSIGNMENT.** The Contractor shall not assign, sub-contract, or transfer any portion of the work set forth herein without the prior written approval of the City; ~~provided, however, that the Contractor may, without such written consent, assign this Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this agreement. Any purported assignment in violation of this section shall be void and of no effectS.~~

7. **BOOKS AND RECORDS.** The Contractor shall maintain or cause to be maintained all records, books, or other documents relative to charges, costs, expenses, fees, alleged breaches of Agreement, settlement of claims, or any other matter pertaining to the Contractor's demand for compensation by the City for a period of not less than three (3) years from the date of the final payment for work performed under this Agreement.

8. **INSURANCE.** The Contractor shall provide and pay for such insurance as is set forth in Exhibit A - Insurance Requirements of the City of Stamford, attached hereto as Exhibit A and made a part hereof.

9. **REPRESENTATION.** The Contractor represents that it is an expert in relation to the work to be performed under this Agreement. The Contractor further represents that it has the requisite skill, expertise, and knowledge necessary to perform the scope of services required under the terms of this Agreement, including any supplementary work and the City relies upon said representation in executing this Agreement.

**10. INTERPRETATION.** The parties agree that in the event of any ambiguity between the terms of this Agreement, the City's Request for Proposal (Exhibit A), and the Contractor's Proposal (Exhibit 8), the City in its sole discretion shall determine the terms and/or the documents which shall prevail and take precedence.

11. **NON-APPROPRIATION.** Contractor acknowledges that the City is a municipal corporation and that the City's obligation to make payments under this Agreement is contingent upon the appropriation by the City's Board of Representatives of funds sufficient for such purposes, for each budget year in which this Agreement is in effect. If sufficient funds to provide for the payment(s) hereunder are not appropriated, the City may terminate this Agreement upon notice in writing to the Contractor.

12. **SUBCONTRACTING.** The Contractor is prohibited from subcontracting this Agreement or any part of it unless the City first approves such subcontracting in writing and approves, in writing, the specific subcontractors proposed to be used by the Contractor. An agreement made in violation of this provision shall confer no rights on any party and shall be null and





void.

In addition to the foregoing, pursuant to Section 103.4 of the Code, the Contractor agrees to supply the City with the names and addresses of all subcontractors to be used for any subcontract which shall be in an amount in excess of Ten Thousand Dollars (\$10,000.00). Said information shall be supplied at the time such contracts are executed.

13. **CONTRACT EXTRAS.** Pursuant to Section 23-18.4C of the Code, it is specifically understood and agreed by the Contractor that all contract extras regarding this contract shall be governed by the City Charter and/or the Code. The City shall not be liable for payment of any additional costs unless the provisions of the City Charter and/or the Code are fully complied with. The provisions of the City Code can be found at [www.municode.com](http://www.municode.com)

14. **COMPLIANCE WITH CITY CODE PROVISIONS.** The Contractor shall fully comply with the applicable requirements of Sections 103-1 through 103-7 of the Code. Failure to so comply shall constitute a material breach of the terms of this Agreement, for which the City may unilaterally terminate the Agreement upon written notice to the Contractor; ~~provided, however, such written notice shall permit the Contractor a reasonable time period in which to cure the failure.~~ The provisions of the City Code can be found at [www.municode.com](http://www.municode.com)

15. **TERMINATION.** A. **TERMINATION FOR CAUSE.** If, ~~through any cause,~~ the Contractor shall fail to fulfill, in a timely and proper manner, its material obligations under this Agreement, or if the Contractor shall violate any of the material covenants, agreements, or stipulations of this Agreement, the City shall thereupon have the right to terminate this Agreement for cause by giving written notice to the Contractor of such termination and specifying the effective date thereof, ~~provided, however, the written notice shall grant to the Contractor a reasonable time to cure such failure, at least five (5) days before the effective date of such termination. In that event, all finished or unfinished reports, documents, data, studies, surveys, drawings, maps, models, photographs, and reports or other material prepared by the Contractor and/or its subcontractors under this Agreement shall, at the option of the City, become its property, and.~~ The Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed ~~on such documents and other materials~~ to the effective date of termination.

The term "cause" includes, without limitation the following:

- 1) If the Contractor furnished any statement, representation, warranty or certification in connection with this Agreement, which is materially false, deceptive, incorrect, or incomplete.
- 2) If the Contractor fails to perform to the City's satisfaction any material requirement of the Agreement, or is in violation of any specific material provision thereof:
- 3) ~~If the City reasonably determines satisfactory performance of the Agreement is substantially endangered or can reasonably anticipate such an occurrence or default.~~

Notwithstanding the above, the Contractor shall not be relieved of liability to the City for any damages sustained by the City by virtue of any breach of the Agreement by the Contractor. ~~and the City may withhold any payment to the Contractor for the purposes of setoff until such time as the exact amount of damages due the City from the Contractor is determined.~~

B. **TERMINATION FOR CONVENIENCE.** The City may terminate this Agreement at any time the City determines that the purposes of the distribution of monies under the Agreement would no longer be served by completion of the Work/Project. The City shall effect such termination by giving written notice of termination to the Contractor and specifying the effective date thereof, at least twenty (20) days before the effective date of such termination. ~~In that event, all finished or unfinished documents and other materials as described Subsection A shall, at the option of the City, become its property.~~ If the Agreement is terminated by the City as provided herein, the Contractor shall be paid an amount for ~~which bears the same ratio to the total compensation as~~ the services actually and satisfactorily performed to the effective date of termination, ~~plus any fees that would have been payable to the Contractor through the natural expiration of the then-applicable contract term bear to the total services of the Contractor pursuant to the terms of the Agreement, less payments of compensation previously made, and subject to the City's right of set off for any damages pursuant to the terms of the Agreement.~~



[Section Number] **DISPUTE RESOLUTION**

**A. EXECUTIVE MEETING**

The parties shall endeavor to resolve all claims, disputes, or other matters in controversy arising out of or related to the Contract ("Claims") through a meeting of the chief executives of each party, or their respective designees ("Executive Meeting").

A request for an Executive Meeting shall be made by a party in writing and delivered to the other party. The request may be made concurrently with the filing of a non-binding mediation as set forth herein. The Executive Meeting shall be a condition precedent to mediation unless 30 days have passed after the Executive Meeting has been requested with no meeting having been held.

The Executive Meeting shall be held in the place where the Project is located, unless another location is mutually agreed upon.

**B. MEDIATION**

Any Claim subject to, but not resolved by, an Executive Meeting shall be subject to mediation, with such mediator as mutually agreed upon by the parties. ~~which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Mediation Procedures in effect on the date of the Agreement. A request for mediation shall be made in writing, delivered to the other party to the Contract, and filed with the person or entity administering the mediation.~~

~~The request may be made concurrently with the filing of arbitration but, in such event, mediation shall proceed in advance of arbitration, which shall be stayed pending mediation for a period of 60 days from the date of filing, unless stayed for a longer period by agreement of the parties or court order. If an arbitration is stayed pursuant to this Section, the parties may nonetheless proceed to the selection of the arbitrator(s) and agree upon a schedule for later proceedings.~~

The parties shall share the mediator's fee and any filing fees equally. The mediation shall be held in the place where the Project is located, unless another location is mutually agreed upon. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

**~~C. ARBITRATION~~**

~~Any Claim subject to, but not resolved by, mediation shall, in the sole discretion of the City, be subject to arbitration which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Arbitration Rules in effect on the date of the Agreement. A demand for arbitration shall be made in writing, delivered to the other party to the Contract, and filed with the person or entity administering the arbitration.~~



-6-

~~A demand for arbitration shall be made no earlier than concurrently with the filing of a request for mediation, but in no event shall it be made after the date when the institution of legal or equitable proceedings based on the Claim would be barred by the applicable statute of limitations. For statute of limitations purposes, receipt of a written demand for arbitration by the person or entity administering the arbitration shall constitute the institution of legal or equitable proceedings based on the Claim.~~

~~The award rendered by the arbitrator or arbitrators shall be final, and judgment may be entered upon it in accordance with applicable law.~~

~~Any judgment will be entered or court action will be brought in a court of competent jurisdiction within the State of Connecticut.~~

**D. PERFORMANCE DURING DISPUTE**

Unless otherwise directed by the City of Stamford, Contractor shall continue performance under this Contract while matters in dispute are being resolved.

**D. CLAIMS FOR DAMAGES**

Should either party to the Contract suffer injury or damage to person or property because of any act or omission of the party or of any of his employees, agents or others for whose acts he is legally liable, a claim for damages therefor shall be made in writing to such other party within a reasonable time after the first observance of such injury or damage.

16. **GOVERNING LAWS.** This Agreement shall be governed by the laws of the State of Connecticut.

17. **GIFTS:** During the term of this contract, including any extensions, the Contractor shall refrain from making gifts of money, goods, real or personal property or services to any appointed or elected official or employee of the City of Stamford or the Stamford Board of Education or any appointed or elected official or employee of their Boards, Commissions, Departments, Agencies or Authorities. All references to the Contractor shall include its officers, directors, employees, and owners of more than 5% equity in the contractor. Violation of this provision shall constitute a material breach of this Agreement, for which this Agreement may be summarily terminated.

### **18. DATA PRIVACY.**

This Section shall govern the rights of Contractor and the City, as the case may be, with respect to the data that is subject to this Agreement. Contractor will, by provisions in its Privacy Policy or otherwise, procure from such end users all such lawful consents and rights necessary to grant to the City the rights in such data as stated in this Section. Contractor's Privacy Policy, as it may be amended from time to time in Contractor's sole discretion, can be viewed at <https://www.passportinc.com/privacy-policy>.

- A. Operational data is data specific to the City's operation that is provided by the City to Contractor to be used in the providing of services. Operational data is specific to the City's operation, which is not available to Contractor publicly or by other means. Operational data may include, but is not limited to, zone information, rate information, operational schedules, business metrics, relevant details of partner agreements. In each case, Operational data may refer to past, present, or future states of such items.

Operational data is the sole and exclusive property of the City. The City grants Contractor a perpetual, irrevocable, royalty-free, non-exclusive, non-assignable, and non-transferrable license to Operational data, provided that, Contractor may assign or transfer such license to a successor in connection with the transfer or sale of all or substantially all of its assets or business related to this agreement, or in the event of its merger, consolidation, change in control or similar transaction.

- B. Payment Card Industry-Data Security Standard Information ("PCI-DSS Information") consists of the following items, each as defined by the then-current Payment Card Industry Data Security Standards ("PCI-DSS"): Account Data; Cardholder Data; Primary Account Number; and Sensitive Authentication Data.

Contractor acquires a license or sublicense to the PCI-DSS Information from end users who share such data with Contractor in connection with their use of the Software. Contractor must secure such data in accordance with PCI-DSS. As such, Contractor may not grant the City derivative rights to such PCI-DSS Information and Contractor shall not be required to disclose such PCI-DSS Information to the City.

- C. Personal identifiable information ("PII") is any representation of information that permits the identity of an individual to whom the information applies to be reasonably determined or inferred by either direct or indirect means. Name, address, social security number or other identifying number or code, telephone number, or email address directly identify individuals. Certain data elements—including gender, race, birth date, geographic indicator (such as zip code or postal code), and other descriptors—can be used in conjunction or with other data elements to indirectly identify individuals. Information permitting the physical or online contacting of a specific individual (e.g., IP address) is also personally identifiable information. End users of Contractor's Software own PII and license it to Contractor pursuant to Contractor's Privacy Policy, as it may be amended from time to time in Contractor's sole discretion. Contractor may sublicense PII to the City under certain conditions (including but not limited to the City's compliance with information security controls and applicable regulations) that shall be memorialized separately if and when applicable.

- D. Activity data is any data generated in the providing of services under this agreement by Contractor to the City and by end users' interactions with the services or with Contractor directly that is not otherwise PCI-DSS information or PII as defined above. Activity data may include, but is not limited to, user interaction data, geolocation data, opt-in/opt-out status (including compliance logs), purchase and session data, application diagnostic data, service performance data, and support data. Data that is derived from Activity data is also Activity data.

Activity data is the sole and exclusive property of Contractor. Contractor grants the City an irrevocable, royalty-free, non-exclusive, non-assignable, and non-transferrable license to Activity data for the duration of the term of this Agreement and only to the extent and





in the format that Contractor chooses in its sole discretion to expose such data through its administrative portal or as otherwise agreed upon with the City and only for the City's internal use in connection with the services provided under this agreement.

**19. PRIVACY POLICY; TERMS OF USE.**

End users' use of the Services shall at all times be governed by (a) Contractor's Privacy Policy, as it may be amended from time to time in Contractor's sole discretion, which can be viewed at <https://passportinc.com/privacy-policy/>, and (b) Contractor's Terms and Conditions, as they may be amended from time to time in Contractor's sole discretion, which can be viewed at <https://passportinc.com/terms-and-conditions/>.

**20. INTELLECTUAL PROPERTY.**

- A. Contractor grants the City a revocable, non-exclusive, non-assignable, non-transferrable, and non-subleaseable right and license to use and access the Software only for its internal business purposes for the duration of the Term. All intellectual property rights including, without limitation, trade names, source code, trademarks, copyrights, patents, and trade secrets, not explicitly granted to the City in this agreement are reserved to Contractor.
- B. The City will not, directly, indirectly, alone, or with another party, (i) copy, disassemble, reverse engineer, or decompile the software or any subpart thereof; (ii) modify, create derivative works based upon, or translate the software or source code; (iii) transfer or otherwise grant any rights in the software or source code in any form to any other party; (iv) attempt to do any of the foregoing or cause or permit any third party to do or attempt to do any of the foregoing, except as expressly permitted hereunder.

**21. CONFIDENTIALITY.**

- A. The City and Contractor agree to treat this Agreement and all information furnished, or to be furnished, by or on behalf of the other party and information analyses, summaries and other work product derived from such information (collectively, the "Confidential Information") in accordance with the provisions of this section and to take, or abstain from taking, all actions set forth herein. Each party, as a receiving party, will do the following things with regard to the Confidential Information of the other party:
  - i. Prevent the disclosure of the Confidential Information by the receiving party and each of the receiving party's employees, agents, and/or professionals to any third party other than as permitted under this Agreement;
  - ii. Use, and permit the use of, the Confidential Information only for the purposes of providing, or enjoying the benefit of, the goods, services, and/or software provided for in this Agreement (the "Purpose");
  - iii. Disclose the Confidential Information only to such of the receiving party's employees, agents, and professionals as have a bona fide need to possess or know the Confidential Information in the course of accomplishing, or advising the disclosing party with regard to, the Purpose;
  - iv. Cause each employee, agent, or professional to whom the receiving party discloses the Confidential Information to be bound by an obligation of confidentiality that is at least as rigorous as the obligations contained in this Agreement; and
  - v. Return or destroy all written or other tangible copies of Confidential Information in the receiving party's possession or direct or indirect control, including all extracts and copies thereof, within a reasonable time after, and in accordance with, the disclosing party's request.
- B. Nothing in this Agreement will prevent the receiving party from disclosing or using Confidential Information to the extent that:
  - i. It is or becomes readily ascertainable by proper means by the public without any breach of a confidentiality obligation of the receiving party;
  - ii. It is received from a third party that is not under an obligation of confidentiality of which the receiving party knew or had reason to know;
  - iii. It was independently developed by the receiving party without use of the Confidential Information; or
  - iv. It is required by law to be disclosed, provided that the receiving party provides to the disclosing party as much notice as is practicable under the circumstances of such requirement prior to disclosure and provides to the disclosing party, at the disclosing party's expense, such reasonable assistance as the disclosing party requests in seeking confidential treatment, protective orders, nondisclosure, and/or similar measures.

For the avoidance of doubt, none of the requirements of this Section shall prohibit the City from disclosing Confidential Information to the extent that such information is required to be disclosed pursuant to any open records law, open meetings law, or any other local public disclosure law applicable to the City.

**22. FORCE MAJEURE.**



Neither Contractor nor the City will be held liable for any delay or omission in performance of their duties under this Agreement resulting from causes beyond their reasonable control, including, for the sake of illustration and not limitation, delays or omissions attributable to third-party vendors, suppliers, or integration partners, labor strikes, acts of god, acts of the public enemy, fires, natural disasters, wars, or riots.

**23. LIMITATION OF LIABILITY.**

In no event will Contractor be liable to the City for any lost profits, lost savings, or punitive, incidental, indirect, special, or consequential damages arising out of the City's use or inability to use the Software or the breach of this agreement, even if Contractor has been advised of the possibility of such damages.

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