a town for a lifetime
IRONDEQUOIT New York

REGULAR TOWN BOARD MEETING

FEBRUARY 17, 2026

7:00 PM

AGENDA

PLEDGE OF ALLEGIANCE

ROLL CALL

SUPERVISOR'S REMARKS & ANNOUNCEMENTS

PRESENTATIONS/PROCLAMATIONS

PUBLIC INPUT

FINANCIAL REPORT

APPROVAL OF MINUTES

January 05, 2026, Organizational Meeting Minutes

January 12, 2026 Workshop Meeting Minutes

January 20, 2026 Regular Town Board Meeting Minutes

PUBLIC HEARINGS:

ITEM(S) FOR BOARD ACTION:

Appointments:

2A2026-1 Resolution Authorizing the appointment of a Town Board Member

2A2026-2 Resolution Authorizing the appointment of an Office Clerk II

Comptroller:

2A2026-3 Resolution Authorizing the calling of a Public Hearing to provide opportunity for public comment on Irondequoit's Community Development Block Grant Program

2A2026-4 Resolution Authorizing the use of fund balance for public works equipment.

2A2026-5 **Resolution Authorizing the Supervisor to enter into an agreement for legal services.**

Human Resources:

2A2026-6 **Resolution Authorizing the increase in salary to compensate for increased duties.**

IT:

2A2026-7 **Resolution Authorizing the Supervisor to enter into a contract for Municipal Code & Compliance Management Software with Online Solutions, LLC (Citizenserve)**

2A2026-8 **Resolution Authorizing the approval of a website redesign and content management system agreement with Revize, LLC**

Police:

2A2026-9 **Resolution Authorizing attendance to the 2026 Bivona Child Advocacy Center Child Abuse Summit**

2A2026-10 **Resolution Authorizing an agreement between the Town of Irondequoit, the Irondequoit Police Department, and George W. Long Inc. d/b/a Sea Breeze Park**

2A2026-11 **Resolution Authorizing attendance to Group Crisis Intervention Course**

2A2026-12 **Resolution Authorizing reimbursement to the Livingston County Sheriff's Office per General Municipal Law 72C**

2A2026-13 **Resolution Authorizing the acceptance of the 2025 ASPCA New York Shelter Standards Implementation Grant: Animal isolation area & kennel upgrades int the amount of $75,000.**

Public Works:

2A2026-14 **Resolution Authorizing the Supervisor to enter into an agreement with the City of Rochester and the Town of Irondequoit regarding paving services.**

Town Clerk:

2A2026-15 **Resolution Approving the Special Event License for Shamrock Jacks LLC Annual St Patrick's Day Festival**

Upcoming Meetings:

Workshop Meeting	March 9th, 2026	@ 4:00PM
Regular Town Board Meeting	March 17th, 2026	@ 7:00PM

ORGANIZATIONAL TOWN BOARD MEETING MINUTES JANUARY 5, 2026 001

Organizational Town Board Meeting of the Town Board of the Town of Irondequoit held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 5th day of January 2026 at 4:00 p.m. local time, there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Peter Wehner	Town Board Member
McConville Considine Cooman & Morin PC	Attorney for the Town

ABSENT:

Grant Malone	Town Board Member

OTHERS IN ATTENDANCE: Comptroller Diana Marsh, Commissioner of Public Works Erin Magee, Director of Recreation Shannon Grieve, Director of Community Services Bill Lang, Chief Scott Peters, Chief of Staff Maria Vecchio, Court Clerk Kim Kimble, Foreman Thomas Albert, Planning and Zoning Coordinator Michelle Nichols, Assessor Dan Stanford, Personnel Analyst Linda Mosely and Town Clerk Latasha Elder.

Supervisor Perticone called the Organizational Meeting to order at 4:08 p.m. and Pledge was said. Supervisor Perticone stated the first meeting of the year where resolutions are adopted to organize the Town's business for the coming year. Roll was called by Town Clerk Elder.

ITEMS FOR BOARD ACTION:

1ORG2026-1 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF THE TOWN CLERK FOR THE TOWN OF IRONDEQUOIT

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **reappointing Latasha Elder as the Town Clerk for the Town of Irondequoit.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-001

1ORG2026-2 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF A DEPUTY SUPERVISOR FOR THE TOWN OF IRONDEQUOIT

Resolution was pulled seeing that there was no quorum.

1ORG2026-3 RESOLUTION AUTHORIZING THE APPOINTMENT OF ASSISTANT TO THE TOWN SUPERVISOR FOR THE TOWN OF IRONDEQUOIT

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **appointing Maria Vecchio as the Assistant to the Supervisor for the Town of Irondequoit.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-002

1ORG2026-4 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF COMPTROLLER FOR THE TOWN OF IRONDEQUOIT

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **reappointing Diana Marsh as Comptroller for the Town of Irondequoit.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-003

1ORG2026-5 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF COMMISSIONER OF THE DEPARTMENT OF PUBLIC WORKS FOR THE TOWN OF IRONDEQUOIT

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **reappointing Erin Magee as Commissioner of the Department of Public Works for the Town of Irondequoit.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-004

1ORG2026-6 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF DIRECTOR OF DEVELOPMENTAL SERVICES FOR THE TOWN OF IRONDEQUOIT

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **reappointing William Lang as Director of Developmental Services for the Town of Irondequoit.**

UPON VOTING	Town Board Member	Wehner	voting	Aye

	Town Board Member	Malone	voting	Absent

	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-005

1ORG2026-7 RESOLUTION TO DESIGNATE AN OFFICIAL TOWN NEWSPAPER

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **designating The Daily Record as the official Town Newspaper.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-006

1ORG2026-8 RESOLUTION TO BOND TOWN OFFICERS, CLERKS AND EMPLOYEES

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **bonding Town Officers, Clerks and Employees.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-007

1ORG2026-9 RESOLUTION REQUIRING CHECKS TO BE COUNTERSIGNED BY COMPTROLLER

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **requiring checks to be countersigned by Comptroller.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-008

1ORG2026-10 RESOLUTION AUTHORIZING THE APPOINTMENTS OF THE DEFERRED COMPENSATION COMMITTEE

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **appointing the Deferred Compensation Committee.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-009

1ORG2026-11 RESOLUTION TO OPEN COMPETITIVE BIDS

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **authorizing the opening of competitive bids.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-010

1ORG2026-12 RESOLUTION AUTHORIZING THE SUPERVISOR TO APPOINT SEASONAL, ON-CALL, PART-TIME AND TEMPORARY STAFF

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **authorizing the Supervisor to appoint seasonal, on-call, part-time and temporary staff.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-011

1ORG2026-13 RESOLUTION AUTHORIZING THE APPOINTMENT OF BOARD OF ETHICS MEMBERS

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **appointing Board of Ethics Members.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-012

1ORG2026-14 RESOLUTION THE REAPPOINTMENT OF THE TOWN HISTORIAN

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a

resolution was adopted **reappointing Timothy Judd as the Town Historian.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-013

1ORG2026-15 RESOLUTION AUTHORIZING FILLING A CONSERVATION BOARD VACANCY

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **authorizing the filling of a Conservation Board Vacancy.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-014

1ORG2026-16 RESOLUTION AUTHORIZING THE APPOINTMENT OF A PLANNING BOARD ALTERNATE MEMBER

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **authorizing the appointment of a Planning Board Alternate Member.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-015

1ORG2026-17 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF A PLANNING BOARD MEMBER

On a motion of Councilmember **Cunningham,** seconded by Councilmember **Wehner.** a resolution was adopted **authorizing the reappointment of a Planning Board Member.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-016

1ORG2026-18 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF A PLANNING BOARD CHAIRMAN

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **authorizing the reappointment of a Planning Board Chairman.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-017

1ORG2026-19 RESOLUTION AUTHORIZING THE REAPPOINTMENT OF CONSERVATION BOARD MEMBERS

On a motion of Councilmember **Wehner,** seconded by Councilmember **Cunningham.** a resolution was adopted **authorizing the reappointment of Conservation Board Members.**

UPON VOTING	Town Board Member	Wehner	voting	Aye
	Town Board Member	Malone	voting	Absent
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution Number 2026-0018

Upcoming Meetings:

Workshop Meeting	*Monday, January 12, 2026*	*@ 4:00PM*
Regular Town Board Meeting	*Tuesday, January 20, 2026*	*@ 7:00PM*

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the

Organizational meeting was adjourned at 4:14 p.m.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Respectfully submitted,

Latasha Elder

Latasha Elder, Town Clerk

Workshop Meeting of the Town Board of the Town of Irondequoit, held in the Broderick Room at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 12th day of January 2026 at 4:00 P.M, there were:

PRESENT:	Supervisor	John Perticone
	Town Board Member	Ann Cunningham
	Town Board Member	Grant Malone
	Deputy Supervisor	Peter Wehner
	Attorney for the Town	McConville Considine Cooman & Morin PC

Others in attendance included Comptroller Diana Marsh, Director of Community Development Bill Lang, Director of Recreation Shannon Grieve, Commissioner of Public Works Erin Magee, Chief of Staff Maria Vecchio, Chief Scott Peters, Assessor Dan Stanford and Deputy Town Clerk Sherida Yanguas.

Supervisor Perticone called the meeting to order and Pledge was said. Deputy Town Clerk Yanguas called Roll.

SUPERVISOR'S REMARKS: The Supervisor spoke regarding 8 graduates from Bishop Kearney are headed to the Olympics. The Supervisor stated there will be a proclamation at the Regular Town Board Meeting

Financial Report: was read by the Comptroller and will be presented at the Regular Town Board Meeting to be voted on

Approval of Minutes: will take place at the Regular Town Board Meeting

REVIEW OF AGENDA ITEMS FOR THE JANUARY 20, 2026 REGULAR TOWN BOARD MEETING:

Each department that submitted resolutions for approval of the Town Board reviewed those resolutions with the Board.

ITEMS FOR BOARD ACTION:

01WS2026-1 Resolution Authorizing the reappointment of the Deputy Supervisor for the Town of Irondequoit

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Malone**, a resolution was adopted **authorizing the reappointment of Peter Wehner as Deputy Supervisor for the Town of Irondequoit.**

UPON VOTING	Deputy Town Supervisor	Wehner	voting	Abstained
	Town Board Member	Malone	voting	Aye
	Town Board Member	Cunningham	voting	Aye
	Town Supervisor	Perticone	voting	Aye

Resolution #2026-019

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham**, an Executive Session was called pursuant to Public Officers Law Section 105(6) for the discussion of matters relating to medical, financial, credit or employment history of a particular person or cooperation, or relating to appointment, promotion, demotion, discipline or removal.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Executive Session

On a motion made by Councilmember **Malone,** seconded by Councilmember **Cunningham**, the Executive Session was adjourned, and the Workshop Board meeting was reconvened at 5:09 p.m.

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the Workshop Meeting was adjourned at 5:10 p.m.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Respectfully taken by Deputy Sherida Yanguas,

Latasha Elder

Latasha Elder, Town Clerk

REGULAR TOWN BOARD MEETING JANUARY 20, 2026 010

Regular Town Board Meeting of the Town Board of the Town of Irondequoit, held in the Broderick Room at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the **20th day of January 2026,** at 7:00 P.M., local time, there were:

PRESENT:	Supervisor	John Perticone
	Town Board Member	Ann Cunningham
	Town Board Member	Grant Malone
	Deputy Supervisor	Peter Wehner
	Attorney for the Town	McConville Considine, Cooman & Morin PC

Others in attendance included Director of Recreation Shannon Grieve, Director of Community Services Bill Lang, Commissioner of Public Works Erin Magee, Comptroller Diana Marsh, Assistant to the Supervisor Maria Vecchio, Chief of Police Scott Peters, Director of Human Resources Jason Vinette, Assessor Dan Stanford and Town Clerk Latasha Elder.

Supervisor Perticone called the meeting to order, and the Pledge was said. Town Clerk Latasha Elder called Roll.

SUPERVISOR'S REMARKS AND ANNOUNCEMENTS: Informed residents regarding public hearings and ground rules. Blood drive January 22nd, at Town Hall 11-4. Winterfest February 7th 11-3 at Town Hall campus. AARP tax prep phone line is open. Gave background information on eight Bishop Kearny graduates.

PROCLAMATION:
Proclamation was read by the Supervisor honoring eight Bishop Kearny graduates that will be participating in the 2026 Hockey Olympic games

PUBLIC INPUT
David Tuccio, 649 Preservation Trail – Spoke regarding a multipurpose facility and field availability
Robert Dates, 3 Harrison Ter **–** Spoke regarding a troublesome tree on his property
Drew Herzig, 96 Leland Rd. – Spoke regarding waste hauler removal
Terry Carter, 99 Oakridge – Spoke regarding zoning for the old church building on Colebrook

FINANCIAL REPORT:

In this report, I am presenting a preliminary look at the 2025 financial results for the Town as of December 31. The 2025 books will not close until the end of February to allow for receipt and processing of outstanding commitments, and to account for and properly book the remaining revenue that is owed to the Town. Again, during the February and March Town Board meetings, I will present the most current 2025 preliminary results. The Town's auditors from the Bonadio Group will present highlights of the audited 2025 Financial Statements and Audit Report upon completion of the audit work.

The 2025 financial results as of December 31st: 100% of the year has elapsed and the Town's total expenses are on par with budget at 100.2%-a sum of $45,401k. Encumbrances are $915k and actual expenses total $44,486k. The actual expenses alone equate to 98.2% of budget. Encumbrances are still an important part of the Town's outstanding commitments.
The General Fund expenses are slightly higher than budget at 100.4% or $28,666k. The actual expenditures are 98.8% of budget or $28,197k and 1.6% ($469k) remains for encumbrances.
Overall, the expenses in the highway funds are higher than budget at 105.2%; a total of approximately $7,653k. The costs in these funds result from considerable expenses for salt, gas, and paving as anticipated.

The Library expenditures are 99.4% of budget-a total of $2,953k. Expenses in the Sewer Fund of $3,721k are below budget at 88.4%.
The Stormwater Drainage expenses are approximately 89.8% of budget-a total of $885k.

Regarding the entire Town, revenue and appropriated fund balance of $41,739k or 95.0% has been documented to date.
The General Fund has recorded revenue of $25,717k-93.2% of budget. Real estate tax of $13,01Ok has been collected. 114% of the Payment In Lieu Of Tax revenue of $325k has been received. 8 months of Sales Tax revenue in the amount of $ 4,907k (70.1% of budget); the AIM payment of $613k has been received and Mortgage Tax for the three quarters of $1,068k has been received. Additional revenue to be recorded includes 6 months of franchise fees, 4 months of sales tax and 3 months of mortgage tax.
At month-end, the Library had confirmed revenue of $2,912k-100.0%. 93.4% or $6,721k of revenue has been recorded by the Highway Funds. 98.9% of the Sewer Fund of $3,907k has been verified.
Stormwater Drainage has received 98.9% of its budgeted revenue-$972k.

This concludes the 1st preliminary financial report for December 2025.

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Malone,** the financial report was approved.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

APPROVAL OF MINUTES: On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the December 8, 2025 Workshop Meeting Minutes were approved.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the December 16, 2025 Regular Town Board Meeting minutes were approved.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

PUBLIC HEARINGS:

7:35PM

01PH2026-1 On the matter to amend Local Law Article VIII Section 210-32 and 333, entitled "Parcel Combination"

On a motion made by Councilmember **Malone,** seconded by Councilmember **Cunningham, the public hearing was opened at 7:35 pm.** Assessor Dan Stanford gave an explanation regarding parcel combination

No one wished to speak on this matter

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On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner, the public hearing was closed at 7:36 pm.**

PH2026-1 RESOLUTION ADOTING AN AMENDMENT TO LOCAL LAW ARTICLE 8 SECTIONS 210-32 AND 33

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Malone,** the resolution was adopted **approving to amend Local Law Article VIII Section 210-32 and 33 entitled "Parcel Combination"**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-033

7:36PM

01PH2026-2 On the matter to amend the Historic Preservation Law of the Town of Irondequoit

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner, the public hearing was opened at 7:37 pm.** Director of Community Services Bill Lang gave a brief explanation regarding the Historic Preservation Law

No one wished to speak on this matter

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On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner, the public hearing was closed at 7:38 pm.**

PH2026-2 RESOLUTION ADOPTING A PROPOSED LOCAL LAW TO AMEND THE HISTORIC PRESERVATION LAW OF THE TOWN OF IRONDEQUOIT

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Malone,** the resolution was adopted **approving an amendment to the Historic Preservation Law of the Town of Irondequoit**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-034

7:37PM

01PH2026-3 On the matter of a proposed local law to amend the Town of Irondequoit Procurement Policy

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner, the public hearing was opened at 7:39 pm.** The Town Attorney gave a explanation regarding the Town's Procurement Policy and the changes.

No one wished to speak on this matter

.

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham, the public hearing was closed at 7:40 pm.**

PH2026-3 RESOLUTION ADOTING A PROPOSED LOCAL LAW TO AMEND THE PROCUREMENT POLICY OF THE TOWN OF IRONDEQUOIT

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **approving an amendment to the Town of Irondequoit's Procurement Policy**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-035

7:38PM

01PH2026-4 On the matter of a proposed local law to impose a temporary moratorium on small cell or microcell wireless telecommunications facilities within the Town of Irondequoit

On a motion made by Councilmember **Malone,** seconded by Councilmember **Cunningham, the public hearing was opened at 7:42 pm. The Town Attorney talked about how this moratorium would allow the town time to consider different amendments to the local law.**

The following residents spoke on the above matter:

Patty Mauer, 88 Pinecrest
Debra Vanwert, 107 Montclair Dr
Mark Scaramucci, 118 Lake Breeze Park

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On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham, the public hearing was closed at 7:50 pm.**

PH2026-4 RESOLUTION ENACTING A LOCAL LAW IMPOSING A MORATORIUM ON SMALL CELL SITE APPLICATIONS

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Malone,** the resolution was adopted **approving a moratorium on small cell site applications**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-036

ITEMS FOR BOARD ACTION:
Appointments:
01A2026-1 RESOLUTION AUTHORZING THE REAPPOINTMENT FOR THE BOARD OF ASSESSMENT REVIEW IN THE TOWN OF IRONDEQUOIT

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham,** the resolution was adopted **approving the reappointment of A Board of Assessment**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-020

01A2026-2 RESOLUTION AUTHORZING THE APPOINTMENT OF A CLEANER IN THE BUILDING MAINTENANCE DEPARTMENT

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Malone,** the resolution was adopted **approving the appointment of a cleaner in the Building Maintenance Department**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-021

01A2026-3 RESOLUTION AUTHORZING THE APPOINTMENT OF A SENIOR MOTOR EQUIPMENT OPERATOR IN THE DEPARTMENT OF PUBLIC WORKS

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham,** the resolution was adopted **approving the appointment of Chris Amico to the tittle of Senior Motor Equipment Operator in the Department of Public Works**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-022

01A2026-4 RESOLUTION AUTHORZING THE APPOINTMENT OF LABOR FOREMAN IN THE DEPARTMENT OF PUBLIC WORKS

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **approving the appointment of Craig Race to the title of Labor Foreman in the Department of Public Works**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-023

01A2026-5 RESOLUTION AUTHORZING THE REAPPOINTMENT OF A BINGO INSPECTOR FOR THE TOWN OF IRONDEQUOIT

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **approving the reappointment of Joseph Lombardo to the title of Bingo Inspector for the Town of Irondequoit**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-024

Community Development:

01A2026-6 RESOLUTION AUTHORIZING A DATE CHANGE FOR THE FEBRUARY PLANNING BOARD PUBLIC HEARING MEETING DATE

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the resolution was adopted **approving the date change for the February Planning Board Public Hearing Meeting Date from February 23rd to February 18, 2026.**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-025

Comptroller:

01A2026-7 RESOLUTION AUTHORZING ADJUSTMENT OF THE MILEAGE REIMBURSEMENT RATE FOR 2026 TO $.725 CONSISTENT WITH A RATE ALLOWED BY THE US INTERNAL REVENUE SERVICE

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **approving the adjustment of the 2026 mileage reimbursement rate to $.725 which is consistent with a rate by the US Internal Revenue Service**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-026

Police:

01A2026-8 RESOLUTION AUTHORZING TO HAVE STOP SIGNS ERECTED ON PARDEE ROAD

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the resolution was adopted **approving stop signs to be erected on Pardee Road**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-027

01A2026-9 RESOLUTION AUTHORZING THE ACCEPTANCE OF A MONETARY GIFT FROM JANET TRAGESER TO THE IRONDEQUOIT POLICE DEPARTMENT K9 UNIT

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **approving the acceptance of a monetary gift from Janet Trageser to the Irondequoit Police Department K9 Unit**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-028

01A2026-10 RESOLUTION AUTHORZING THE SUPERVISOR TO ENTER INTO VARIOUS CONTRACTS WITH VENDORS FOR THE TOWN'S 2026 WINTERFEST CELEBRATION

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham,** the resolution was adopted **approving the Supervisor to enter various contracts with vendors for the Town's 2026 Winterfest Celebration**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-029

01A2026-11 RESOLUTION AUTHORIZING THE SUPERVISOR TO ENTER INTO A CONTRACT WITH WEST IRONDEQUOIT FOUNDATION FOR CORNHOLE TOURNAMENT

On a motion made by Councilmember **Malone,** seconded by Councilmember **Wehner,** the resolution was adopted **authorizing the Supervisor to enter into a contract West Irondequoit Foundation for Cornhole Tournament**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-030

Supervisor:

01A2026-12 RESOLUTION GRANTING PERMISSION FOR THE AMERICAN RED CROSS TO HOLD BLOOD DRIVES AT THE IRONDEQUOIT TOWN HALL CAMPUS

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the resolution was **adopted granting permission for the American Red Cross to hold blood drives at the Irondequoit Town Hall Campus**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-031

Town Clerk:

01A2026-13 RESOLUTION APPROVING THE SPECIAL EVENT LICENSE FOR YELLOWJACKET RACING/FLEET FEET CUPID'S CUP 5K RUN/WALK

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Malone,** the resolution was adopted **approving the Special Event License for Yellowjacket Racing/Fleet Feet Cupid's Cup 5k Run/Walk**

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Resolution Number 2026-032

On a motion made by Councilmember **Wehner,** seconded by Councilmember **Cunningham**, an Executive Session was called pursuant to Public Officers Law Section 105(6) for the discussion of matters relating to medical, financial, credit or employment history of a particular person or cooperation, or relating to appointment, promotion, demotion, discipline or removal.

UPON VOTING MOTION WAS UNANIMOUSLY APPROVED

Executive Session

On a motion made by Councilmember **Malone,** seconded by Councilmember **Cunningham**, the Executive Session was adjourned, and the Workshop Board meeting was reconvened at 5:09 p.m.

Upcoming Meetings:

Workshop Meeting:	**Monday, February 9, 2026**	**@ 4:00pm**
Regular Town Board Meeting:	**Tuesday, February 17, 2026**	**@ 7:00pm**

On a motion made by Councilmember **Cunningham,** seconded by Councilmember **Wehner,** the Regular Town Board Meeting was adjourned at 9:30 p.m.

Respectfully submitted,

Latasha Elder

Latasha Elder, Town Clerk

Resolution No. 2026-

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING THE APPOINTMENT OF A TOWN BOARD MEMBER

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026 at 7:00 P.M. local time there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member _____ offered the following resolution and moved its adoption:

WHEREAS, a vacancy currently exists on the Irondequoit Town Board due to the election of former Councilmember John Perticone to the position of Supervisor, whose term would have expired on December 31, 2027; and

WHEREAS, pursuant to Town Law Section 64(5) and Public Officers Law Section 42(1), the Town Board may appoint a qualified person to fill a vacancy in an elective office; and

WHEREAS, the person so appointed shall hold office until the commencement of the calendar year next succeeding the first annual election at which the vacancy may be filled; and

WHEREAS, the next annual election at which the vacancy may be filled will be held on November 3rd , 2026; and

WHEREAS, the Town Board desires to fill this vacancy by appointing Steve Barz as a member of the Irondequoit Town Board.

NOW THEREFORE BE IT RESOLVED, that the Town Board approves the appointment of **Steven Barz, Town Board Member, Term Expires December 31, 2026**.

AND BE IT FURTHER RESOLVED, that Mr. Barz shall be paid an annual salary of $13,224.00 from budget code 001.1010.0104.1100, which salary shall be prorated for the portion of the year for which he will occupy the position of Councilmember.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

Resolution 2026-

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING THE APPOINTMENT OF AN OFFICE CLERK II

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member_____ offered the following resolution and moved its adoption:

WHEREAS, due to a recent resignation there is a need to appoint a full-time Office Clerk II in the Recreation Department; and

WHEREAS, this position is included in the 2026 budget; and

WHEREAS, the Civil Service list has been certified and has been deemed unviable due to the number of interested candidates; and

WHEREAS, the Director of Recreation wishes to appoint an internal candidate to fill this vacancy.

NOW THEREFORE BE IT RESOLVED that the Town Board approves the appointment of an Office Clerk II an hourly rate of $23.19 to be paid from budget line A1714046/510000.

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

Resolution No. 2026 -

EXTRACT OF THE MINUTES OF A MEETING OF TOWN BOARD IN THE MATTER OF SCHEDULING A PUBLIC HEARING TO PROVIDE OPPORTUNITY FOR PUBLIC COMMENT ON IRONDEQUOIT'S COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (CDBG)

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026 at 7:00 P.M. local time there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member
McConville Considine Cooman & Morin PC	Attorney for the Town

Town Board Member _____ offered the following resolution and moved its adoption:

WHEREAS, the Town of Irondequoit is a Community Development Block Grant (CDBG) entitlement community and, as such, receives an annual block grant from the U.S. Department of Housing and Urban Development (HUD); and

WHEREAS, the Town's CDBG Citizen Participation Plan requires the Town Board to hold a public hearing annually to offer opportunities for the public to comment on the Town's CDBG program, including performance of contractors and sub-recipients, and to suggest needs or activities to be considered for funding in future program years.

NOW, THEREFORE BE IT RESOLVED, that the Town Board schedules a public hearing at the regular meeting of March 17, 2026, at 7:3x pm to provide for public comment on the Irondequoit Community Development Block Grant (CDBG) Program.

This resolution shall take effect immediately upon its adoption.
Seconded by Town Board Member _____and duly put to vote, which resulted as follows:

Town Board Member	Wehner		voting	_____
Town Board Member	Malone		voting	_____
Town Board Member	Cunningham	voting		_____
Town Supervisor	Perticone	voting		_____

Resolution No. 2026-_____

EXTRACTION OF MINUTES OF MEETING OF TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING THE USE OF FUND BALANCE FOR PUBLIC WORKS EQUIPMENT

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026 at 7:00 P.M. local time there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board member _____offered the following resolution and moved its adoption:

WHEREAS, the public works department has small equipment, including a vinyl cutter, riding mower and a floor sweeper, in need of replacement to ensure ongoing operations; and

WHEREAS, this cost was not anticipated in the 2026 budget; and,

WHEREAS, the estimated cost of the replacement is $25,100 will be made available in account A1331000-521300 ($6,500-vinyl cutter), A1711000-521300 ($15,000-riding mower) and A1164000-521300 ($3,600-floor sweeper) from the general fund balance.

NOW, THEREFORE BE IT RESOLVED, that the Town Board is authorizes the use of fund balance in an amount not to exceed $25,100 to be paid from account # A1331000-521300 ($6,500-vinyl cutter), A1711000-521300 ($15,000-riding mower) and A1164000-521300 ($3,600-floor sweeper) .

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board member _____and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

Resolution No. 2026-

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING THE TOWN SUPERVISOR TO ENTER INTO AN AGREEMENT FOR LEGAL SERVICES

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026 at 7:00 P.M. local time there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member
McConville Considine Cooman & Morin PC	Attorney for the Town

Town Board Member _____ offered the following resolution and moved its adoption:

WHEREAS, it is necessary for the Town of Irondequoit to have an Attorney for the Town to provide legal counsel and general municipal legal services to the Town; and

WHEREAS, pursuant to Town Code Section 51-10, the Town issued a Request for Proposals for General Legal Services on January 5, 2026 (the "RFP"). A copy of the RFP is attached as **Attachment A** hereto; and

WHEREAS, RFP responses were due by January 20, 2026; and

WHEREAS, the Town received four (4) responses to the RFP; and

WHEREAS, the Town convened an RFP Selection Committee (the "Committee") that reviewed the responses, conducted a preliminary ranking, and interviewed three responding firms; and

WHEREAS, at the conclusion of the interviews and after reviewing all relevant RFP materials, the Committee recommends that the Town Board hire _____ as Attorney for the Town; and

WHEREAS, funding for these services is located in in account A1142000-541200.

NOW THEREFORE BE IT RESOLVED, that the Town Board appoints _____ as Attorney for the Town, and authorizes the Supervisor to enter into an agreement with _____ in substantially the form annexed hereto as **Attachment B** and in such final form as approved by the Attorney for the Town.

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

a town for a lifetime
IRONDEQUOIT New York

Release: January 5, 2026

Request for Proposals

For

General Legal Services

Submissions due: **January 20, 2026 at 4 p.m. EST**

Deliver written submissions to:

Diana Marsh
Comptroller
Town of Irondequoit
1280 Titus Avenue
Rochester, NY 14617

Deliver electronic submissions to: **dmarsh@irondequoit.gov**

TABLE OF CONTENTS

A. NOTICE 1
B. BACKGROUND 1
C. INSTRUCTIONS FOR SUBMISSION 2
SUBMISSION OF PROPOSAL 2
REQUESTS FOR INFORMATION 2
DEADLINE FOR SUBMISSION 2
RESERVATION OF RIGHTS 3
BOARD APPROVAL REQUIRED 3
D. SCOPE OF SERVICES 3
CLIENT 3
GENERAL SCOPE OF SERVICES 3
LEGAL SERVICES EXCLUDED FROM RFP 4
E. SUBMISSION REQUIREMENTS 4
FORMAT 4
SUBMISSION REQUIREMENTS 4
F. TENTATIVE SCHEDULE 6
G. SELECTION PROCEDURE AND CRITERIA 7
SELECTION PROCEDURE 7
EVALUATION CRITERIA 7

A. NOTICE

The Town of Irondequoit ("Town") is soliciting written proposals from qualified attorneys and/or law firms to provide general municipal legal services as the Attorney for the Town. The selected attorney or law firm will enter into a contract with the Town of Irondequoit to perform the professional services described more completely below. The term "firm" shall be used hereafter to mean law firms as well as individual attorneys.

The scope of the services is described in this Request for Proposals ("RFP"). Copies of this RFP may be obtained from the Office of the Town Clerk between the hours of 8:30 a.m. and 4:30 p.m. EST.

Pursuant to Town Code Chapter 51, the Town will hold interviews with firms submitting proposals. Interviews will be coordinated at the sole direction of the Town, and it is required that key staff members from each firm attend. The Town reserves the right to set the interview date and time, but to the extent practicable, the Town will accommodate specific scheduling requests.

The Town reserves the right to accept or reject any and all proposals if it determines it is in the best interests of the Town.

B. BACKGROUND

The Town of Irondequoit is bordered on three sides by bodies of water, the Genesee River to the west, Lake Ontario to the north, and Irondequoit Bay to the east, giving rise to its historic Haudenosaunee placename "where land and waters meet." Established in 1839 as a town within Monroe County, it was a predominately rural municipality characterized by an agrarian economy and early waterfront resort communities until the early twentieth century when it transformed to a densely populated inner-ring suburb of the City of Rochester. The Town is home to approximately 51,000 people.

The Town is governed by a five-member Town Board, which includes the Town Supervisor. The Town Board meets approximately twenty-five times per year. Regular Town Board meetings take place at 7:00 p.m. on the third Tuesday of each month. Workshop meetings take place at 4:00 p.m. on the second Monday of each month. An organizational meeting is held annually in January. Each Town Board meeting and Town Board workshop meeting lasts approximately ninety minutes. The Town Board adopts approximately three hundred resolutions per year. All Town Board meetings may be viewed online at https://www.youtube.com/@Town-of-Irondequoit/streams. The Town Code can be found at: https://ecode360.com/IR0059?needHash=true

C. INSTRUCTIONS FOR SUBMISSION

SUBMISSION OF PROPOSAL

The Town is soliciting proposals to provide General Legal Services as Attorney for the Town. Prospective firms must offer a proposal that will meet the scope of services, qualifications, and general description of work activities identified in Section D of this RFP.

Submitted proposals must follow the format as outlined in this RFP to ensure the Town receives comparable documents, allowing for a fair and objective review and evaluation.

Final responses to this RFP must include one (1) hard copy or one (1) electronic copy of your proposal. Electronic copies must be submitted in .doc or PDF format.

Proposals must be clearly marked as "Response to RFP for General Legal Services." Proposals must be signed by an official authorized to legally bind the firm to all provisions included in the proposal.

Submit proposals to:

Diana Marsh
Comptroller
Town of Irondequoit
1280 Titus Avenue
Rochester, NY 14617
dmarsh@irondequoit.gov

REQUESTS FOR INFORMATION

All requests for information and questions shall be made in writing to the Comptroller, Diana Marsh, at the email address listed above with the subject line: "RFP: General Legal Services – Request for Information" no later than **January 12, 2026** at **12:00 p.m. EST.** Any inquires sent after that time will not receive a response. Answers to all questions will be included as part of an Addendum to this RFP and distributed to all known firms via email by January 14, 2026. After January 14, 2026, the Addendum will also be available for review and may be obtained from the Office of the Town Clerk between the hours of 8:30 a.m. and 4:30 p.m. EST, Monday through Friday.

No contact will be allowed between responding law firms or attorneys and any Town employee or official unless permission is specifically authorized in writing by the Comptroller. Prohibited contact may be grounds for disqualification.

DEADLINE FOR SUBMISSION

Final proposal submissions must be received no later than **4:00 p.m. EST** on **January 20, 2026**. To be considered, proposals must arrive on or before the date and time specified. Requests for extension of the submission date will not be granted. Allow ample delivery time to assure timely receipt of any mailed proposals.

RESERVATION OF RIGHTS

The Town reserves the right to: refuse any and all proposals in part or entirely; disregard all nonconforming, nonresponsive, or conditional proposals; and waive any or all informalities. The Town will base its selection on the evaluation criteria in Section G.

BOARD APPROVAL REQUIRED

Any award is subject to the execution of a contract between the selected firm and the Town. The Town's contract obligation is contingent upon: (1) approval of the contract by the Town Board and (2) execution of the contract between the Town and selected firm. No legal liability on the part of the Town for payment of any money shall arise unless and until a contract is executed by both parties. The Town shall have no responsibility or liability for any of the firm's costs related to preparation of responses, attendance at interviews, etc.; all such costs are solely at the firm's risk and expense.

D. SCOPE OF SERVICES

CLIENT

The client shall be the Town Board, with the Town Supervisor acting as the main point of contact.

GENERAL SCOPE OF SERVICES

The services requested include providing legal services for all matters related to Town operations, including but not limited to legal review, document generation, legal representation, litigation and other court-related tasks.

The legal services desired are more fully described as follows:

1. Advise the Town Supervisor, Town Board, and other Town officials in all areas of municipal law;
2. Serve as Town Attorney for all Town Board and Town Board workshop meetings;
3. Provide general municipal legal advice and interpret municipal, state, and federal law as it applies to the Town;
4. Provide legal advice on the Freedom of Information Law and Open Meetings Law;
5. Advise any staff members of the Town as authorized by the Town Supervisor;
6. Advise the Conservation Board, Historic Preservation Commission, Board of Ethics, and Deer Management Program Board and attend meetings, as requested;
7. Conduct legal research, find relevant facts, develop and review documents as requested by the Town Board and/or Town Supervisor;
8. Prepare and review ordinances, resolutions, legal notices, contracts, deeds, leases, and other written legal documents generated in the course of Town business, as requested;
9. Prosecute Town Code parking violations in Town Court:

10. Coordinate the legal work of the Town's use of outside counsel for legal services beyond the scope of this engagement;
11. Report to the Town Board on pending litigation and coordinate presentations from outside counsel; and
12. Perform other legal services, as assigned.

LEGAL SERVICES EXCLUDED FROM RFP

The Town utilizes a legal team, including multiple law firms and outside counsel, to address the Town's legal needs. The following legal services are carved out of the scope of services in this RFP:

1. Planning Board and Zoning Board of Appeals work;
2. Prosecution of Town Code violations;
3. Board of Assessment Review work;
4. Article 7 Tax Certiorari cases;
5. Labor and Employment law advice;
6. Litigation defense, if provided by counsel assigned by insurance; and
7. Special projects designated by the Town Board requiring specialized legal services.

E. SUBMISSION REQUIREMENTS

Proposals should demonstrate the qualifications, competence, depth, and capabilities of the firms seeking to provide legal services to the Town in conformity with the requirements of this RFP.

FORMAT

Each proposal should include a cover letter and table of contents. The cover letter should not exceed one (1) page and should indicate the firm's interest in the engagement and summarize key points of the proposal.

The table of contents must follow the cover letter and should clearly outline the contents of the proposal.

SUBMISSION REQUIREMENTS

General Information About Firm

1. Name, address, telephone number, and e-mail address of firm.
2. Name of contact person, email, and telephone number for purposes of communications regarding the proposal.
3. Size of the firm, the size of the firm's municipal law staff, the location of the office from which work for the Town will be performed, and the number and nature of the professional staff to be employed in this engagement.

4. Narrative about the history of the firm, including date of inception, experience with relevant New York municipal, state and federal law, and experience providing services to New York municipalities.
5. Explanation of firm resources, including clerical and support staff, library and research capabilities, and other relevant information.

Qualifications of Firm and Legal Team

1. Identify proposed legal team and how it will be organized to accomplish the scope of work.
2. Provide Certificate of Good Standing from the New York State Unified Court System for each attorney proposed to perform legal work under the engagement.
3. Identify the accessibility of the proposed legal team, and the response time that they offer to the Town.
4. Narrative of the qualifications of the person(s) proposed to work directly with the Town to include:
    a) Legal training, years of practice, areas of specialization, date of admission to NY Bar;
    b) Experience representing New York municipalities, including the percentage of overall workload that is dedicated to municipal clients and the years of municipal law practice;
    c) Litigation experience; and
    d) Professional affiliations.

Mandatory Questions

Firms must provide an answer to each of the questions listed below. Please designate the answers in the table of contents as "Mandatory Question Responses."

1. Are any attorneys, officers, principals, partners, or employees of the Law Firm/Attorney presently disbarred, suspended, proposed for disbarment or discipline, or declared ineligible for a contract, by a federal or state department or Town, including any established courts or administrative tribunals?
2. Has the firm, its officers, principals, partners, or employees that are expected to perform services under this RFP, been disciplined, admonished, warned, or had any license, registration, charter, certification, or any similar authorization to engage in the legal profession suspended or revoked for any reason?
3. Within the last five years has the firm, its officers, principals, partners, or employees expected to perform services under this RFP, been convicted of, or had a civil judgment rendered against them for the commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract, violation of antitrust statutes or commission of embezzlement, theft, forgery,

falsification or destruction of records, making false statements, or receiving stolen property?

4. Has the firm been in bankruptcy, reorganization, or receivership in the last five years? If so, please explain current status.

References

Include identifying and contact information for at least three (3) current references for whom comparable work has been performed within the last three (3) years.

Conflicts of Interest

Indicate if the firm has any conflicts of interest with the Town or Town employees. Please specify the nature of the conflict and propose how the conflict will be addressed.

Proof of Insurance

Provide an affirmative statement that the firm maintains malpractice, Workers' Compensation, and New York Disability insurance coverage. Acknowledge that, if selected, the firm will provide the Town with Certificates of Insurance, with the Town as the Certificate Holder, in a form that is satisfactory to the Town.

Cost Proposal

1. Provide a narrative about the proposed method for calculation of hourly fees or annual rate to provide the legal services as described in Section D.
2. Indicate the hourly rate for each member of the proposed legal team.
3. Indicate whether or not out of pocket expenses, including mileage and subscriptions to legal research resources, are included in the proposed price.
4. Indicate a description of basic services to be included and list services or other incidentals for which additional fees would be charged.
5. Provide a narrative of normal billing cycle procedures.
6. A statement that the prices identified in the cost proposal will remain valid for a minimum of 365 days after August 12, 2024.

F. TENTATIVE SCHEDULE

Advertise Request for Proposal	January 5, 2026
Requests for Information Due	January 12, 2026, at 12:00 p.m.
Addendum(s) Furnished	January 14, 2026
Submissions Due	January 20, 2026, at 4:00 p.m.

Proposal Review Interviews	Week of January 26, 2026
Town Board Resolution/ Contract Execution	February 9, 2026
Transition and Knowledge Transfer	March 2026

G. SELECTION PROCEDURE AND CRITERIA

SELECTION PROCEDURE

The Town will abide by the policy and procedures for securing professional services as detailed in Town Code § 51-10.

The Town's Selection Committee shall formally evaluate and rank each proposal. Interviews with each of the firms submitting proposals shall be held prior to ranking, provided that if more than three firms submit proposals, the Selection Committee may provide a preliminary assessment of all proposals and elect to interview no less than the top three firms. During the interview process, selected firms will be given approximately sixty minutes to present their proposals and answer questions from the Selection Committee. At the conclusion of the interviews, the Selection Committee will evaluate each firm and document the ranking.

Once ranking is complete, the Town will negotiate the terms of a contract with the top-ranked firm. In the event that negotiations are not successful, the second-ranked firm shall be invited to engage in a similar negotiation.

When negotiations are complete, the Selection Committee shall present the scope of the professional services to be performed and the proposed fee to the Town Board for approval.

The Town reserves the right to make selection based on its sole judgment and further reserves the right to reject any and all proposals.

EVALUATION CRITERIA

In order to determine what response is most advantageous, the Town will evaluate all responses on the basis of the criteria specified below. These criteria are not necessarily listed in order of importance. The Town reserves the right to weigh its evaluation criteria in any manner it deems appropriate. Although price will be a factor in consideration of the responses, it is not the sole criterion.

All complete proposals received by the Town of Irondequoit will evaluated for:

1. Firm's qualifications and demonstrated capability to provide the solicited legal services;
2. Communication skills and the ability to work effectively with the Town Board, Town Supervisor, municipal staff members, and the Town's Boards and Committees;
3. Depth and breadth of experience and expertise in the practice of law, specifically in those matters most often encountered in New York municipalities such as municipal

administration, tax collection and assessing, road/transportation law, land use law, ethics law, and municipal finance;

4. Ability to perform legal services promptly and in a manner that permits the Town's administration to meet established deadlines, to act expeditiously in matters requiring legal counsel, and to operate in an effective and efficient manner;
5. Degree of availability for quick response to inquiries that arise out of day-to-day operating questions or problems and availability to accommodate attendance at meetings, as necessary;
6. References of municipalities for which similar services are currently being provided;
7. Firm's price proposal;
8. General quality and responsiveness of the proposal;
9. Degree to which the proposal addresses all items in the Scope of Services; and
10. Other qualifications or criteria as deemed appropriate by the Town.

TOWN OF IRONDEQUOIT, NEW YORK

AGREEMENT FOR GENERAL MUNICIPAL LEGAL SERVICES

(Town Attorney / General Counsel Contract)

This Agreement ("Agreement") is made and entered into this ___ day of _____**, 20____**, by and between:

TOWN OF IRONDEQUOIT

a municipal corporation organized under the laws of the State of New York,
having offices at:

Town Hall
1280 Titus Avenue
Irondequoit, NY 14617
("Town")

and

_____

Attorney and/or Law Firm, with principal offices located at:

_____

_____

("Counsel")

---

1. ENGAGEMENT AND APPOINTMENT

The Town hereby retains Counsel to provide **General Municipal Legal Services** as the Attorney for the Town, pursuant to New York Town Law and as authorized by resolution of the Irondequoit Town Board.

This Agreement is entered into following the Town's Request for Proposals for General Legal Services issued January 5, 2026.

2. CLIENT DESIGNATION

The client shall be the **Town Board**, with the **Town Supervisor acting as the main point of contact** for direction and authorization of services.

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3. SCOPE OF SERVICES

Counsel shall provide legal services for all matters related to Town operations, including but not limited to legal review, document generation, legal representation, litigation, and other court-related tasks.

The legal services provided under this Agreement shall include, but are not limited to:

1. Advising the Town Supervisor, Town Board, and other Town officials in all areas of municipal law.
2. Serving as Town Attorney for all Town Board and Town Board workshop meetings.
3. Providing general municipal legal advice and interpreting municipal, state, and federal law as it applies to the Town.
4. Providing legal advice on the Freedom of Information Law (FOIL) and Open Meetings Law.
5. Advising staff members of the Town as authorized by the Town Supervisor.
6. Advising the Conservation Board, Historic Preservation Commission, Board of Ethics, and Deer Management Program Board and attending meetings as requested.
7. Conducting legal research, developing relevant facts, and reviewing documents as requested by the Town Board and/or Town Supervisor.
8. Preparing and reviewing ordinances, resolutions, legal notices, contracts, deeds, leases, and other written legal documents generated in Town business.
9. Prosecuting Town Code parking violations in Town Court.
10. Coordinating the legal work of outside counsel retained for services beyond this engagement.
11. Reporting to the Town Board on pending litigation and coordinating presentations from outside counsel.
12. Performing other legal services as assigned.

---

4. SERVICES EXPRESSLY EXCLUDED

The Town utilizes multiple law firms and outside counsel to address specialized legal matters. The following services are expressly excluded from this Agreement unless separately authorized by the Town Board:

1. Planning Board and Zoning Board of Appeals work
2. Prosecution of Town Code violations (other than parking violations above)
3. Board of Assessment Review work
4. Article 7 Tax Certiorari cases
5. Labor and Employment law advice
6. Litigation defense provided by counsel assigned through insurance
7. Special projects requiring specialized legal services

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5. TERM OF AGREEMENT

This Agreement shall commence on _____**, 20**, and remain in effect through _____**, 20**, unless terminated earlier pursuant to Section 11.

Renewal, if any, shall require Town Board approval.

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6. COMPENSATION

The Town agrees to compensate Counsel as follows:

☐ Annual Retainer

A retainer fee of $_____ per year, payable ☐ monthly ☐ quarterly ☐ annually.

☐ Hourly Rates

- Partner: $_____/hour
- Associate: $_____/hour
- Paralegal/Staff: $_____/hour

Counsel shall submit itemized invoices monthly in accordance with Town audit and payment procedures.

---

7. REIMBURSABLE EXPENSES

The Town shall reimburse Counsel for reasonable out-of-pocket expenses necessary for performance of services (e.g., filing fees, service costs). Any expense exceeding $_____ requires prior written approval.

---

8. INDEPENDENT CONTRACTOR

Counsel is retained as an independent contractor and shall not be deemed an employee of the Town. Counsel is not entitled to Town benefits, retirement, or civil service protections.

---

9. PROFESSIONAL RESPONSIBILITY

Counsel shall:

- Maintain licensure in good standing in New York State
- Comply with the New York Rules of Professional Conduct
- Avoid conflicts of interest and disclose any potential conflicts immediately

---

10. CONFIDENTIALITY AND PUBLIC RECORDS

Counsel acknowledges that the Town is subject to:

- Freedom of Information Law (FOIL)
- Open Meetings Law
- Records retention requirements

Counsel shall preserve attorney-client privilege and confidentiality to the fullest extent permitted by law.

---

11. TERMINATION

This Agreement may be terminated:

- By either party upon thirty (30) days written notice; or
- Immediately by the Town for cause, including breach, misconduct, or failure to perform.

Upon termination, Counsel shall be compensated only for services rendered through the termination date.

---

12. INSURANCE AND INDEMNIFICATION

Counsel shall maintain professional malpractice insurance with limits of not less than:

- $1,000,000 per claim / $2,000,000 aggregate (or such higher level required by the Town)

Counsel agrees to indemnify and hold harmless the Town from claims arising from Counsel's negligence, errors, or omissions.

---

13. GOVERNING LAW AND VENUE

This Agreement shall be governed by the laws of the State of New York. Venue for any dispute shall lie exclusively in courts located in Monroe County, New York.

---

14. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties. Any modifications must be in writing and approved by the Irondequoit Town Board.

---

15. EXECUTION

IN WITNESS WHEREOF, the parties have executed this Agreement on the date first written above.

TOWN OF IRONDEQUOIT

By: _____
Town Supervisor

Date: _____

Approved by Town Board Resolution No. _____

COUNSEL

By: _____
Name: _____
Firm: _____

Date: _____

Resolution 2026-

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING THE INCREASE IN SALARY TO COMPENSATE FOR INCREASED DUTIES

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member_____ offered the following resolution and moved its adoption:

WHEREAS, due to several resignations in the Human Resources Department there is an immediate need to keep the payroll system up and running and pay all Town Employees; and

WHEREAS, there is a current employee with payroll experience, who is familiar with the new system, who was willing to step up to the challenge of processing payroll for the Town; and

WHEREAS, since this is such a massive undertaking the Supervisor has decided this employee should receive a three-step increase in pay to compensate for such an increase in responsibility; and

NOW THEREFORE BE IT RESOLVED, that the Town Board approves the increase of three steps to the employee that is going to process the Town's payroll. This will be paid from budget line A1143000 and the rate will increase from $32.74 to $35.78 per hour.

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

Resolution No. 2026-_____

A RESOLUTION AUTHORIZING THE SUPERVISOR TO ENTER INTO A CONTRACT FOR MUNICIPAL CODE & COMPLIANCE MANAGEMENT SOFTWARE WITH ONLINE SOLUTIONS, LLC (CITIZENSERVE)

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York, held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the ___ day of _____ 2026 at ___ P.M. local time; there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member
Peter Weishaar	Attorney to the Town

Town Board member _____ offered the following resolution and moved its adoption:

WHEREAS, on March 11, 2021, the American Rescue Plan Act ("ARPA") was signed into law by the President to provide support to State, local, and Tribal governments in responding to the impact of COVID-19 and in their efforts to strengthen municipal operations and service delivery; and

WHEREAS, the Town of Irondequoit has been allocated approximately $22.45 million as part of the American Rescue Plan Act; and

WHEREAS, the Town desires to implement a modern, cloud-based Municipal Code & Compliance Management Software system to support permitting, inspections, code enforcement, licensing, and related regulatory functions, while improving efficiency, transparency, and public access; and

WHEREAS, a Request for Proposals for Municipal Code & Compliance Management Software was issued by the Town, and proposals were received and evaluated in accordance with New York State General Municipal Law §103 and Town procurement policies; and

WHEREAS, at the conclusion of the RFP process, the recommendation is for the Town to contract with Online Solutions, LLC (Citizenserve) for the desired software and implementation services; and

WHEREAS, the Town's consultant with respect to ARPA matters, The Bonadio Group, has approved such use of ARPA funding for this purpose;

NOW, THEREFORE, BE IT RESOLVED, that the Town Board authorizes the use of ARPA funds in an amount of up to $99,300 to engage Online Solutions, LLC (Citizenserve) for Municipal Code & Compliance Management Software, including software subscription, implementation, training, data migration, and related services; and

BE IT FURTHER RESOLVED, that the Town Board authorizes the Supervisor or Acting Supervisor to execute all documents necessary to enter into a contract with Online Solutions, LLC (Citizenserve), as approved by the Attorney for the Town, in an estimated amount of $99,300 and in a total amount not to exceed $162,300; and

BE IT FURTHER RESOLVED, that this resolution shall take effect immediately upon its adoption.

Seconded by Town Board member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting _____
Town Board Member	Malone	voting _____
Town Board Member	Cunningham	voting _____
Town Supervisor	Perticone	voting _____

Proposal for the Town of Irondequoit, New York

Municipal Code & Compliance Management Software

November 3, 2025
12:00 PM

Prepared by
Kara McFall, Manager
Online Solutions, LLC (Citizenserve)
1101 E Warner Rd, Suite 160
Tempe, Arizona 85284
Phone: 800.325.9818 x709
Fax: 800.325.9818
proposals@citizenserve.com

COVER LETTER

October 20, 2025

Mr. Kevin LaBarr
Director of Information Services
Irondequoit Town Hall
1280 Titus Avenue
Rochester, NY 14617

Dear Mr. LaBarr,

Online Solutions, LLC (Citizenserve) is pleased to submit this proposal in response to the Town's Request for Municipal Code & Compliance Management Software. Online Solutions has over 22 years of experience solving the problems the Town seeks help with. We have offered citizenserve® as a Software-as-a-Service solution with accompanying services for public sector customers from the beginning. Our existing client base consists of over 300 municipalities throughout the United States that have community development functions.

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

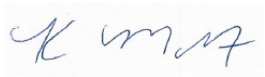
Citizenserve's unique background provides proven experience and reliability for our customers:

- The software has been built organically for 22 years and continually improved based upon customer enhancement requests, changes in technology, and ongoing feedback from our customers. We have never acquired another company or product; all growth has been through thoughtful and continual improvement of the product.

- The names *Online Solutions* and *Citizenserve* have been used since the founding of the company. There have been no mergers, acquisitions, or changes in company leadership in the company's history.
- Citizenserve is debt free and has been profitable for over fifteen years. We are also investor free; our decisions are focused on what is best for our customers rather than making investors happy.
- We do not manage by change order. We use an agile implementation methodology that encourages exploration and welcomes changes in requirements. We know from experience that knowledge gained through a project leads to new ideas, improvements, and oftentimes a whole new approach.
- We have decades of experience implementing the citizenserve solution, converting data from legacy systems, integrating to a wide variety of external systems, and providing comprehensive user training. We have never had a customer dispute or failed implementation or been the subject of litigation.
- We are constantly improving our software. We provide updates and enhancements to the software monthly; all are included with every subscription.

We look forward to sharing how Citizenserve can help to meet the requirements of the Town, support increased service for your constituents, and deliver cost savings. The pricing in this proposal is valid until November 3, 2026.

Sincerely,



Kara McFall, Manager
Online Solutions, LLC (Citizenserve)
Federal Identification Number: 57-1152874
1101 E Warner Rd, Suite 160, Tempe, AZ 85284
800-325-9818 x709
proposals@citizenserve.com

TABLE OF CONTENTS

Cover Page and Cover Letter	Page 1
Table of Contents	Page 4
Section 1 – Executive Summary	Page 6
Section 2 – Citizenserve Information	Page 8
Section 3 – Citizenserve Profile and Experience	Page 9
Section 4 – Key Personnel	Page 11
Section 5 – Citizenserve Solution Overview	Page 14
5.1 – Citizenserve Software Solution	Page 14
5.1.1 – Permitting Module	Page 15
5.1.1.1 – Online Portal	Page 15
5.1.1.2 – Fees and Payments	Page 17
5.1.1.3 – Plan Review and Tracking	Page 22
5.1.1.4 – Applicant Communication and Status Monitoring	Page 27
5.1.1.5 – Inspection Scheduling and Tracking	Page 31
5.1.1.6 – Permit Document Issuance	Page 34
5.1.2 – Planning & Zoning Module	Page 34
5.1.3 – Code Enforcement Module	Page 38
5.1.4 – Licensing Module	Page 43
5.1.5 – Request Tracking	Page 47
5.1.6 – Reporting, Dashboards, and Analytics	Page 48
5.1.7 – Mobile Field Computing	Page 58
5.1.8 – Document Management & Laserfiche Integration	Page 59
5.1.9 – Role-based Security	Page 60
5.2 – Citizenserve Architecture Overview	Page 65
5.2.1 – Citizenserve Architecture	Page 65
5.2.2 – Hosting Model	Page 67
5.2.3 – Uptime History	Page 68
5.2.4 – Release Cadence	Page 68
5.3 – Citizenserve Security	Page 69
Section 6 – Implementation Approach & Schedule	Page 71
6.1 – Citizenserve Implementation Approach	Page 71
6.2 – Citizenserve Implementation Plan	Page 73
6.3 – Draft Project Schedule	Page 77
Section 7 – Data Migration Plan	Page 80
Section 8 – Systems Integration	Page 82
Section 9 – Training & Change Management Plan	Page 84
Section 10 – Citizenserve Unlimited Support and Maintenance	Page 87
Section 11 – Cost Proposal	Page 91
11.1 – Annual Subscription Fees	Page 91
11.2 – Project Management	Page 92

11.3 – Implementation, Configuration, & Training	Page 92
11.4 – Data Migration	Page 92
11.5 – System Integrations	Page 92
11.6 – Citizenserve Budget Matrix	Page 94
Section 12 – Assumptions & Town Responsibilities	Page 95
12.1 – Assumptions	Page 95
12.2 – Town Responsibilities	Page 96
Section 13 – Exceptions to RFP/Contract Terms	Page 99
Section 14 – References	Page 100

SECTION 1 – EXECUTIVE SUMMARY

Online Solutions, LLC (Citizenserve) is pleased to submit this proposal in response to the Town of Irondequoit's Request for Proposal (RFP) for a cloud-based Municipal Code & Compliance Management Software solution. With over 22 years of exclusive focus on community development software for public sector clients, Citizenserve powers 300+ jurisdictions nationwide—including New York municipalities such as Clifton Park, Dunkirk, and Fairport—delivering streamlined permitting, code enforcement, inspections, licensing, and citizen self-service.

Alignment with the Town's Priorities and Objectives

Citizenserve is a low-code SaaS platform that unifies all RFP functional modules (6.1) without custom code:

- Permitting, Plan Review, Inspections, Code Enforcement, Licensing, including AI tools for rapid configuration.
- Robust Mobile/Offline field tools (6.3): Checklist completion, photo and video uploads, GPS stamping, and auto-sync.
- Town-branded, ADA accessible public portal (6.2): Anonymous or registered users, document uploads, real-time tracking, and PCI compliant payments through integration to more than 30 payment processors.
- Workflow Automation and Notifications (6.4): Email/SMS/portal alerts, conditional routing.
- Dashboards, Reporting, & Open Data (6.5): Custom analytics, SLA timers, and FOIL exports.
- Enterprise Security & IT Standards (6.9): SOC 2 Type 2, PCI DSS certified, full audit logs, encryption.
- Unlimited Storage/Data Ownership (6.7, 6.10): The Town owns all its data, documents, and metadata; exports of the Town's data upon request.
- Proven Use Cases: Supports all scenarios – for example, multi-cycle plan reviews with integrated markup tool, complaint-to-legal escalation, and cross-department collaboration (Planning/Zoning/Fire/Public Works).

Citizenserve provides seamless integrations to the Town's external systems:

Integration	Citizenserve Capability
Laserfiche Cloud (6.6)	Auto-archival/retrieval of all docs/attachments.
Tyler Munis (6.7)	Nightly CSV exports to secure FTP; GL-mapped fees and fines.
ESRI GIS (6.8)	Unlimited layers, attributes, and spatial joins; GeoJSON endpoints.
Payment processor	30+ payment processors (credit/debit/ACH, depending on payment processor); escrow accounts.
Single Sign-on	Via integration to Auth0 using the Town's federation service (Microsoft Entra ID).
Multifactor Authentication	Via integration to Auth0, using Microsoft Authenticator.

Fixed-Price Implementation Excellence

- Agile Methodology: Weekly walkthroughs ensure 100% of the Town's requirements are met; data migration from Edmonds/GovTech is fixed price.
- Expert Team: PMP-led (Kara McFall), New York experience (implementation manager Reese Pratt/Clifton Park).
- Unlimited Training and Support post go live; 84% same-day support request resolution; 24/7 support for urgent requests.
- Timeline: implementation within one year.

Best Value Guarantee

No exceptions to RFP terms. Fixed, not-to-exceed pricing. Monthly updates and enhancements included in your subscription, including upcoming AI tools. 99.99% uptime. Debt free and investor free, with no sunsetting plans.

Citizenserve will transform Irondequoit's fragmented processes into a modern, efficient solution – drastically reducing manual work, boosting revenue via self-service, and delighting constituents. We welcome demonstrations and interviews to showcase our Citizenserve solution.

SECTION 2 – CITIZENSERVE INFORMATION

Name:	Online Solutions, LLC (Citizenserve)
Legal Entity:	Limited Liability Company
FEIN:	57-1152874
Address:	1101 E Warner Rd, Suite 160 Tempe, AZ 85284
Authorized Contact:	Kara McFall, Manager kara@citizenserve.com 800-325-9818 x709

SECTION 3 – CITIZENSERVE PROFILE AND EXPERIENCE

Online Solutions, LLC (Citizenserve) was started as an internet software service in 2003. Our citizenserve solution is a low-code software and service solution for community development that covers all aspects of application processing, permitting, planning & zoning, code enforcement, licensing, inspections, and citizen request management. Community development software and services are the only software and services the company has ever offered, and we have focused exclusively on public sector customers. There have been no acquisitions in the company history; all growth has been organic under the same company leadership. The names *Online Solutions* and *Citizenserve* have been used since inception.

We have offered Citizenserve as a Software-as-a-Service solution from the beginning. The Citizenserve software is only provided as a cloud-based subscription. When Citizenserve was started as an internet software service in 2003, the model was uncommon; we were among the first to identify the benefit for community development customers of an easily accessible, cloud-based solution accompanied by unlimited support. Updates and enhancements to the software are provided monthly and are included in all subscriptions at no additional charge. A Citizenserve subscription also includes major upgrades with accompanying change management training, which occur every few years. We are currently rolling out a new version of our public portal and will be rolling out our AI-driven Automated Municipal Intelligence Engine (AMIE) by the end of the year.

There are over 300 jurisdictions and thousands of community development professionals using Citizenserve, including jurisdictions in the State of New York. We have experience implementing and supporting our solution for dozens of towns and cities with similar needs and populations to the Town of Irondequoit, including New York municipalities such as Clifton Park, Dunkirk, and Fairport. Each of our customers faced similar challenges to those facing the Town, and with Citizenserve have completed successful projects. Most of our customers require integration to external systems such as GIS and payment processors, migration of data from legacy systems, and the tailoring of permits, projects, licenses, and enforcement and their accompanying workflows unique to each customer. We have extensive experience implementing the software, tailoring it through configurations to the specific needs of the customer, completing and testing system integrations, successfully migrating legacy data, and thoroughly training users to ensure successful adoption.

We take the stewardship of our customers' data seriously and are certified annually for SOC 2 Type 2 and PCI DSS compliance. As part of the annual audit for the SOC 2 Type 2 Security, Confidentiality, and Availability controls, the independent accounting firm Moore Colson reviews and certifies our security controls, security policies and procedures, employee security training curriculum, and hardware and software. As part of the annual PCI DSS certification, the firm Abrams Security Group, a PCI DSS certified Qualified Security Assessor, reviews and certifies our security controls, security policies and procedures, employee security training curriculum, and hardware and software. Our two Iron Mountain Data Centers in Phoenix, Arizona (primary) and Edison, New Jersey (backup) are SOC 2 and FedRAMP certified, among other certifications.

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

Citizenserve has the solution to fully meet the requirements of the Town, the company experience to ensure a smooth and efficient implementation, and the support model to ensure continuing success.

SECTION 4 – KEY PERSONNEL

We have planned a senior team for the Town's project:

Senior Executive: Julie Garvey

Julie is the LLC Manager and directs Citizenserve's development and implementation. She has been developing and implementing business software solutions since the early 1990s and has extensive experience in software design. Prior projects that Julie has led that are similar in scope to the Town's project include Citizenserve implementations for Revere, Massachusetts; Gulf Shores, Alabama; and Sanford, Florida.

Julie's focus is on customers, software design, customer implementations, and support. Julie is responsible for the overall design and vision of the solution and oversees all major product upgrades. She is currently leading the development of additional Artificial Intelligence (AI) tools for our solution. Julie will be overseeing the development team that delivers twice-monthly updates and enhancements and is a point of escalation.

Project Manager: Kara McFall, PMP

Kara has over 20 years of experience as an IT project manager and project executive and has been a certified Project Management Professional since 1999. In addition, Kara has taught Project Management classes for over 20 years at various universities including University of Oregon, Portland State University, and Concordia University and co-authored and published a Project Management Tools textbook when employed by Portland State University.

Kara has a B.S. in Industrial Engineering from Arizona State University, a M.S. in Industrial Engineering from Purdue University, and an EdD. in Education from Portland State University. She is certified as a Project Management Professional (PMP) through the Project Management Institute and ITIL certified (Information Technology Infrastructure Library) for IT Service Management.

Kara joined Citizenserve in 2018 and has served as the Project Manager for multiple Citizenserve implementations, including Bryan, Texas; Yavapai County, Arizona; and Lady Lake, Florida. Prior to joining Citizenserve, Kara was the director of a technical master's program at the University of Oregon and an IT executive at Oregon Health & Science University.

Kara will be responsible for project management on the project, including ensuring the requirements of the Town are met; overseeing the agile implementation process; and provide communication, scope, schedule, resource, change, issue, and quality management.

Implementation Manager, Reese Pratt, PMP

Reese is an implementation manager, training lead, and operations engineer. Reese has a B.S. from Arizona State University in Computer Science and a M.S. from ASU in Information Management. Reese is a Certified Scrum Master (CSM) and Project Management Professional (PMP). Reese has led implementations similar in scope to the Town's project with Clifton Park, New York; Grand Island, Nebraska; and Lawrence, Massachusetts. He joined the company in 2018. Prior to Citizenserve, Reese was a Scrum Master for a semiconductor company responsible for development and technical support.

Reese will be responsible for leading the implementation, training, and support. Reese is skilled at communicating with clients to understand requirements, configuring citizenserve to meet the requirements, suggesting process improvements, developing and testing data migration scripts, and testing Citizenserve implementations to ensure issues are discovered in a timely manner. Reese has also provided post project support for multiple customers, ensuring continuity in the relationship and the most effective support.

Solution Architect, Syama Pisapati

Syama is the lead solution architect at Citizenserve and has been with the company from the beginning. He has completed integrations between Citizenserve and many other systems. Syama has completed integrations for dozens of Citizenserve customer implementations, including Brockton, Massachusetts; Clifton Park, New York; and St. Charles County, Missouri. Syama's main roles in the company are solution architect, integration lead, and application security lead. Syama is a member of the Citizenserve Security Steering Committee.

Syama has a M.S. in Information Systems from Arizona State University and a B.S. in Mechanical Engineering from Birla Institute of Technology and Sciences. Syama will be the integration lead on the project and will be responsible for developing and testing the Citizenserve-side integrations (code to accept data into Citizenserve or to send data from Citizenserve).

Data Migration Lead, Lisa Amaral

Lisa is the lead migration manager in Citizenserve. She has a degree in Paper Science and Chemical Engineering from the University of Wisconsin, Stevens Point. Prior to joining Citizenserve in 2012, Lisa was the lead software developer for a multi-million-dollar software redesign and rewrite of a pharmaceutical benefits management software system at McKesson.

Understanding the data sources is critical in a successful migration, and Lisa has over 20 years of experience working with databases and data sources. She has a deep understanding of community development and land management legacy systems. Lisa has completed dozens of data migrations into Citizenserve from a variety of community development legacy systems, including Riverdale, Georgia; Jefferson County, Missouri; and Spanish Fort, Alabama and has

never had a failed data migration. She has also served as the implementation manager for multiple Citizenserve projects and has a deep functional and technical knowledge of the system. Lisa works one day a week on the Support desk, assisting customers and troubleshooting issues.

Lisa will be responsible for reverse engineering the legacy data sources, writing and testing the data migration scripts, migrating the Town's legacy data, and certifying the successful migration prior to go live.

SECTION 5 – CITIZENSERVE SOLUTION OVERVIEW

5.1 Citizenserve Software Solution

Citizenserve offers a low-code software and service solution for community development that covers all aspects of application processing, permitting, planning & zoning, inspections, code enforcement, licensing, and citizen request management. The software encompasses internal functions and provides a user-friendly portal to enable electronic relationships with contractors, citizens, and businesses involved in community development processes. All the modules and the online portal are integrated, simplifying data entry and ensuring that critical information is only entered once.

Citizenserve is a browser-based Software-as-a-Service (SaaS) application. Citizenserve is accessed from a browser and does not require a desktop application. Citizenserve is device and browser independent; it can be accessed from any desktop, laptop, tablet, or other mobile device, including both iOS and Android devices. Users can access and use citizenserve from any modern browser. Our offline mode enables inspections to be conducted from the field, even in areas of unreliable coverage.

Citizenserve is a fully integrated solution that has a single database for all modules and the portal; data is entered once and is shared among modules and functions. Interdepartmental coordination is seamless, while data access can be segmented by module and role. Citizenserve's role-based security limits user access to the modules and functions required for their specific roles. Every user can customize their dashboard to include the reporting, metrics, status, and other information required for timely decision making, including data that spans departments.

Citizenserve is a fully automated system that simplifies work processes for staff and constituents. Records and documentation in Citizenserve are electronic and include plans, emails, photos, templates, and notes. Documents are seamlessly shared through integration to Laserfiche Cloud and accessed via direct links. Through the automation of approval workflows, the time-consuming and error-prone process of routing paper documents for approvals across departments is eliminated. Applicants can access the online portal at any time to identify application status, review plan review comments, and communicate electronically with staff, increasing transparency and eliminating staff time spent providing the information.

The Citizenserve product team embraces new technologies and is committed to enhancing the product to continue to meet the needs of our customers. Recent product enhancements include artificial intelligence (AI) innovations. Citizenserve believes that artificial intelligence (AI) will provide strong benefits for the community development solution market and the company has invested heavily in AI, including a dedicated AI team. Recent enhancements include an AI-driven tool that builds the applications and underlying custom fields and tables for permits, projects, and licenses, and builds code enforcement case components, in minutes based on scanned images of current applications or violation letters. We will also be rolling out our Automated Municipal Intelligence Engine (AMIE) by the end of the year; the first applications will dramatically reduce the amount of time code enforcement officers spend entering data from field inspections and aid customers in identifying and recovering registration fees from rentals that are not compliant with municipal registration and licensing requirements.

5.1.1 Permitting Module

Citizenserve has a flexible permitting module that accommodates any type of permit including building, electrical, plumbing, mechanical, fire, right-of-way, demolition, and sign permits. Permits and their associated workflows can be quickly built using our integrated AI tools. You can add an unlimited number of permit types and subtypes for an unlimited number of departments in citizenserve.

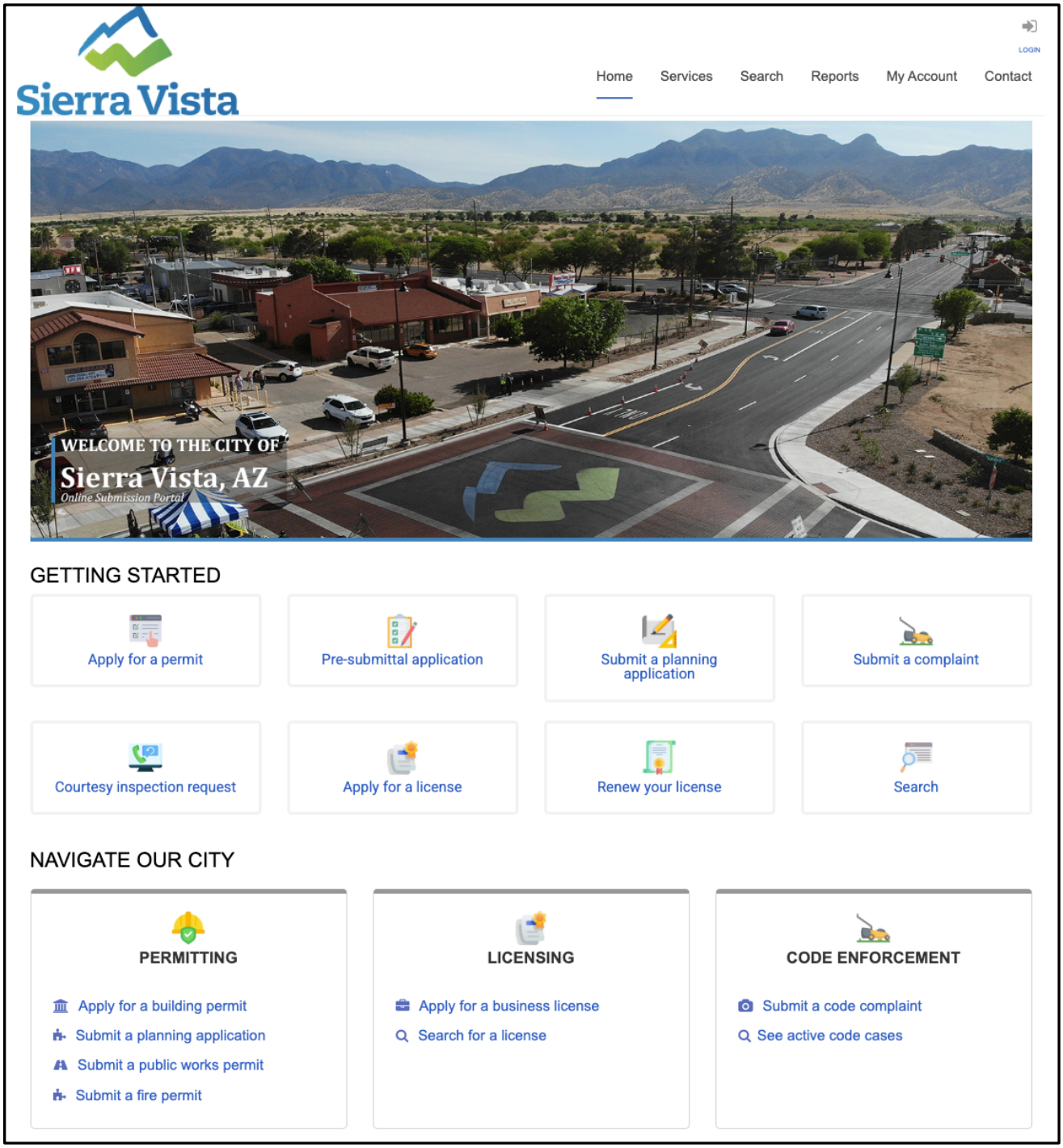
5.1.1.1 Online Portal

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

It's easy for portal users to register for a portal account and update their account information. Clear registration instructions ensure your portal users enter the correct information; the configuration of required fields ensures they provide all of the information you need. Self-service tools such as "Forgot your username" and "Forgot your password" eliminate calls to Town staff. Portal users can opt in (or opt out) to text messages from their portal account. Standard message and data rates apply to text messages sent from citizenserve.

All our portals are ADA-accessible. We test all online portals prior to go live with automated accessibility evaluation tools.

You can post any report on the portal to share information with the public. Citizens can access reports to view non-restricted property, permit, and enforcement history (subject to Town data sharing rules) without a portal login. Portal reports enable the public to obtain the information they need without staff assistance.



Citizenserve Portal Configuration for Sierra Vista, Arizona

The image above shows the configuration of the portal for Sierra Vista, Arizona. The portal enables portal users to submit applications for building, planning, public works, and fire permits and business licenses. Residents can submit code complaints and view active cases. We can easily tailor the Town's portal to only show the Town's relevant information and services.

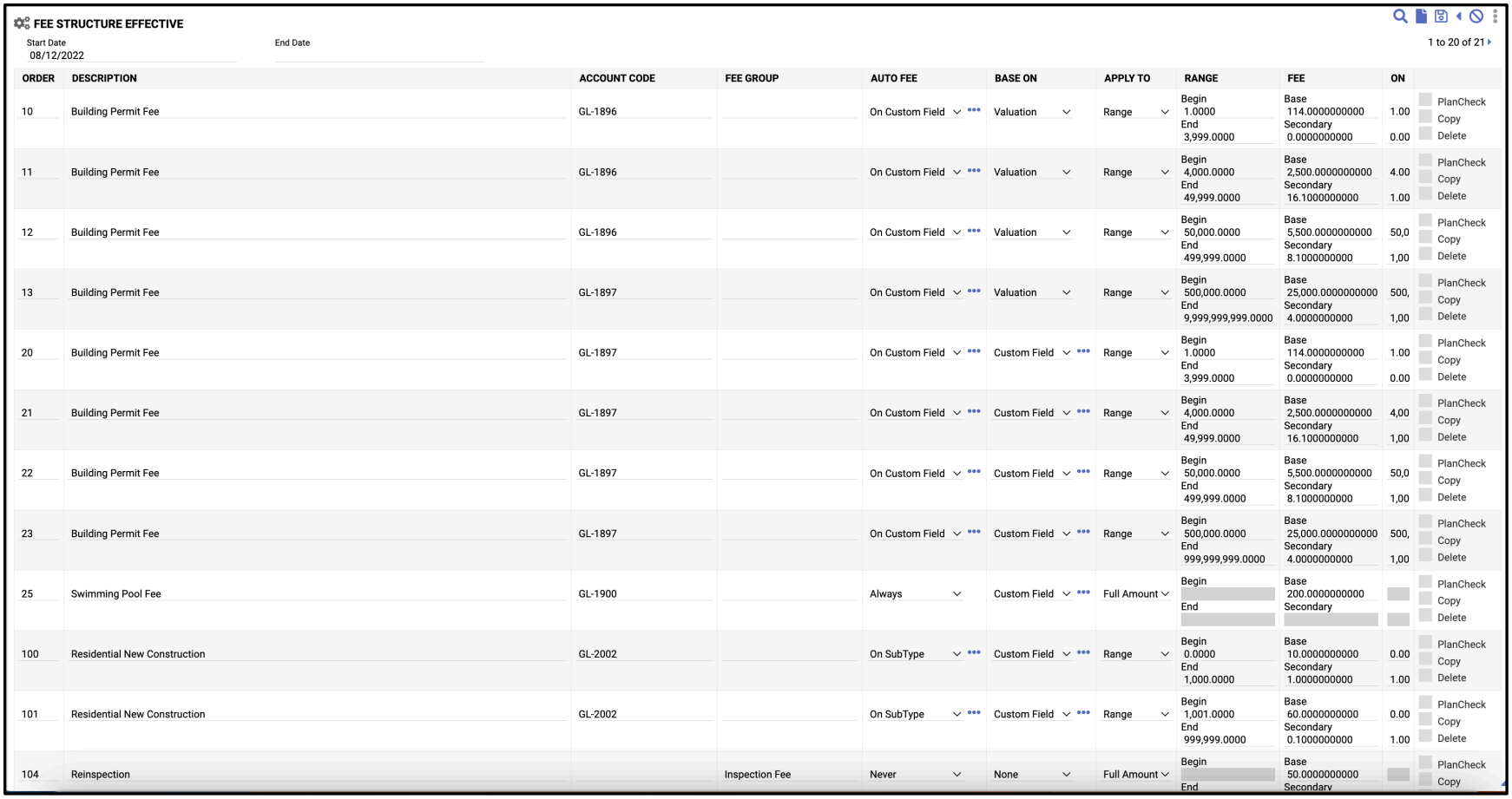
There is enormous flexibility in configuring applications to meet an individual municipality's needs. We will work with the Town during implementation to determine the requirements for each of the Town's permit types; we can replicate existing applications using our integrated AI tools or make improvements and changes as desired. Detailed instructions and point-of-use help bubbles simplify the application process and reduce calls and visits to the Town's offices. Applications can be configured to include the required fields, all explanatory and warning text, help bubbles, Town-specific graphics and logos, all contacts related to an application (contractor, architect, property owner, etc.), and any other data or information required. Applications can also be configured to indicate the required documents that must be uploaded and whether a digital signature is required. Custom fields can easily be added at any time; all custom fields are available for reporting and metrics.

All citizenserve forms can include dynamic fields, which means the application will adapt depending upon the answers provided by the applicant. Conditions can be configured for permit applications that prevent the submittal of an application from the online portal when the condition is triggered; for example, if the contractor has an expired license. Applicants can save in-process applications for completion later.

5.1.1.2 Fees and Payments

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

Citizenserve will set up the Town's fees and map them to the Town's GL codes. Maintenance of the Town's fees is included with the subscription. Citizenserve enables fees to be calculated for applications and paid from the counter or, with integration to a payment processor, securely paid from the portal. The Town determines when fees are displayed on the portal to the applicant; for example, some municipalities do not require fee payment until the plan review process is complete and the application is approved.



FEE STRUCTURE EFFECTIVE

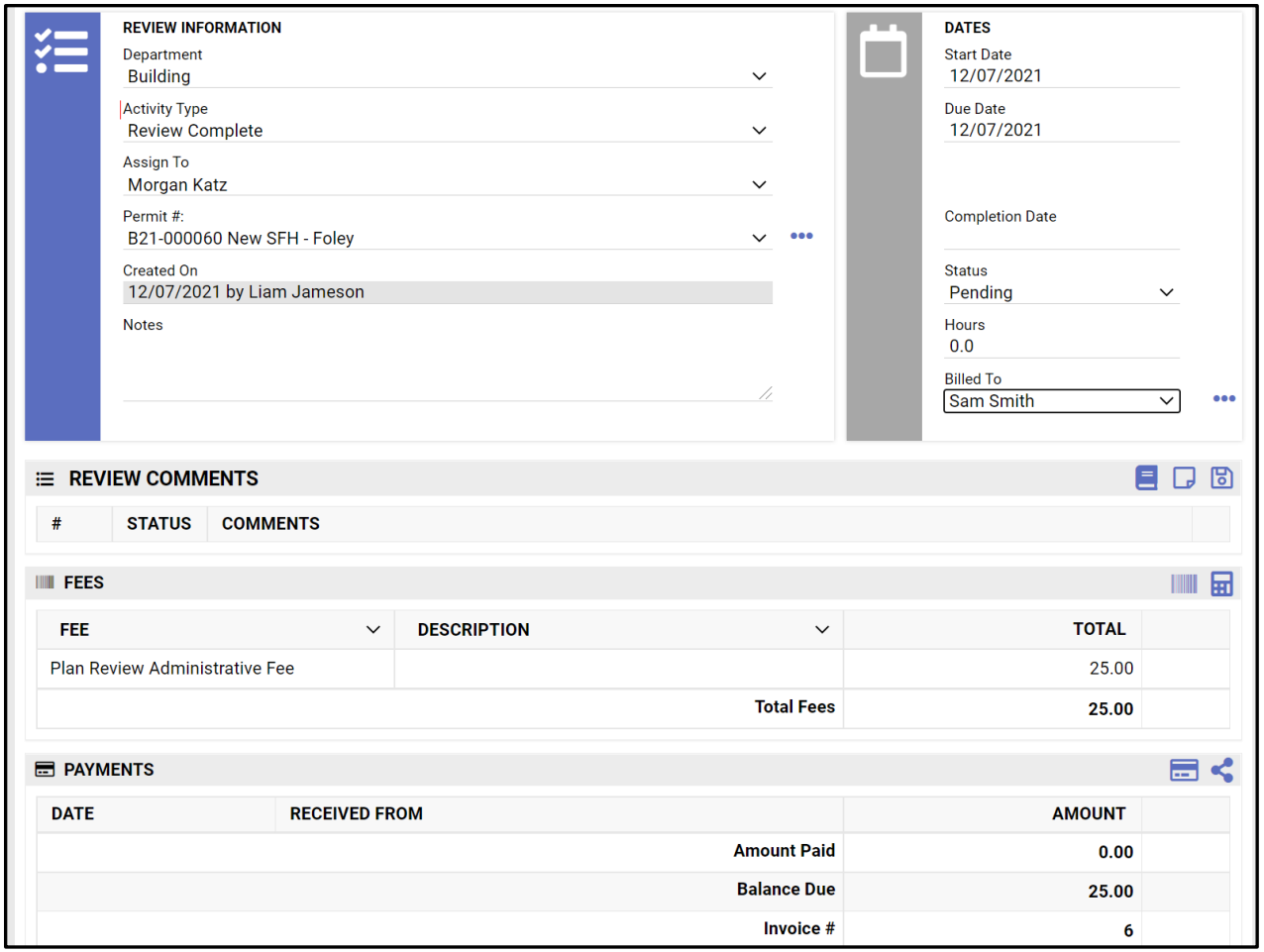
Start Date 08/12/2022 End Date

1 to 20 of 21

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

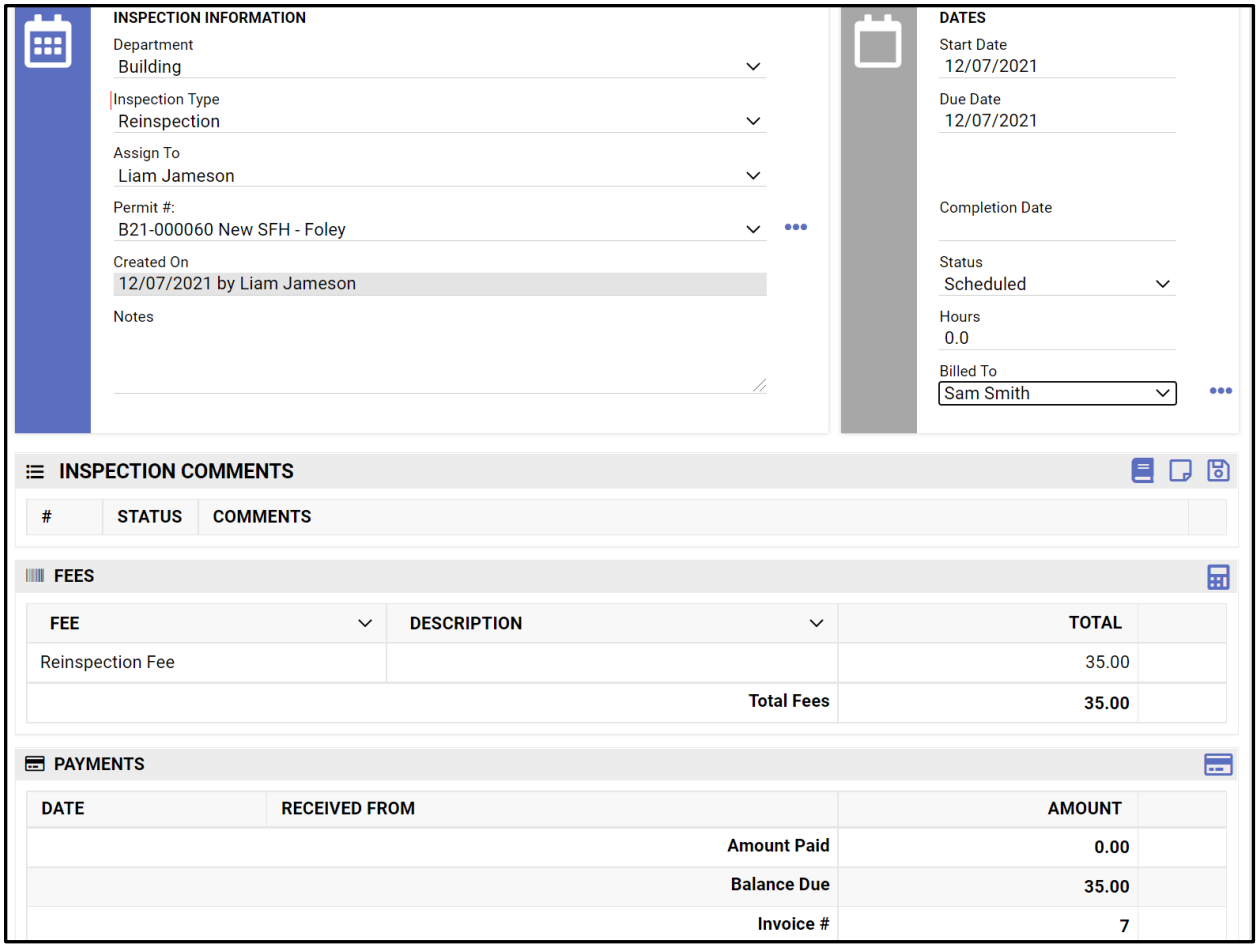
Fee Setup Screen for a Building Department

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



Activity Fee and Payment Screen

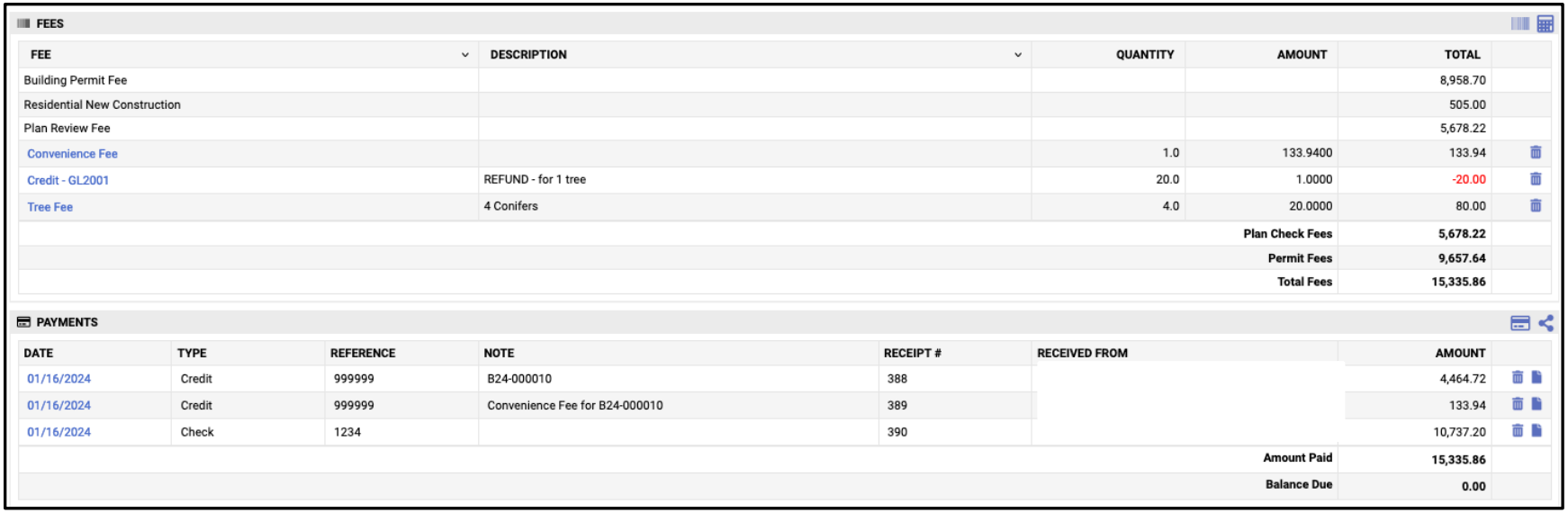
Fees can also be added to inspection activities. The below screen shows a fee that has been assessed for a reinspection.



Inspection Activity Fee

Payments. We have included PCI-compliant integration to a payment processor in our bid to enable the payment of fees from the portal with a credit or debit card (the ability to make ACH payments depends upon the payment processor selected). Citizenserve has integrated to over 30 payment processors; if the Town selects one of these payment processors, there will be no charge for the integration. Citizenserve also enables fees to be paid from escrow accounts.

Once a payment has been made, the system will reflect that a fee was paid, amount and type of payment, and date/time of payment. Payments can be applied across fees and the History will show when the fee(s) were paid. Staff can view permit fees and payments that have been applied for a permit on the Permit Screen. Permit fees can be configured to lock once they are paid.



FEES

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

PAYMENTS

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

Fees and Payments Screen – Building Permit (identifying details whited out)

Financial Reporting. While Citizenserve has standard financial reports available, many customers' finance teams prefer their own variations on reports – different subtotals, sorting criteria, etc. Citizenserve will configure an unlimited number of financial reports for the Town, tailored to the Town's specifications. Examples of custom finance reports we have built for customers include:

- Payment Reconciliation Report,
- Refund Report,
- Payment List,
- Finance Permit Payments,

- Renewals with Revenues,
- Unpaid Permits,
- Fee Structure Export,
- Use Tax Fees Charged,
- End-of-Day Payment Report – Escrow, and
- Escrow Activities by Start Date.

Escrow Tracking. Fees can be paid with a variety of payment types, including escrow accounts. Citizenserve can be configured to track and manage escrow deposit accounts and bonds, including issuance, reduction, and release. Escrow accounts are set up as a standalone activity that is created as part of the initial application review. The bond amount is set based on the amount of cash deposited or the amount of paper bonds secured through a bank. Withdrawals, deposits, and expiration dates are handled through custom fields and tables.

You can access a case study for the solution we implemented for escrow management for Clifton Park, New York at the following link: https://www.citizenserve.com/managing-building-escrow-accounts/

5.1.1.3 Plan Review and Tracking

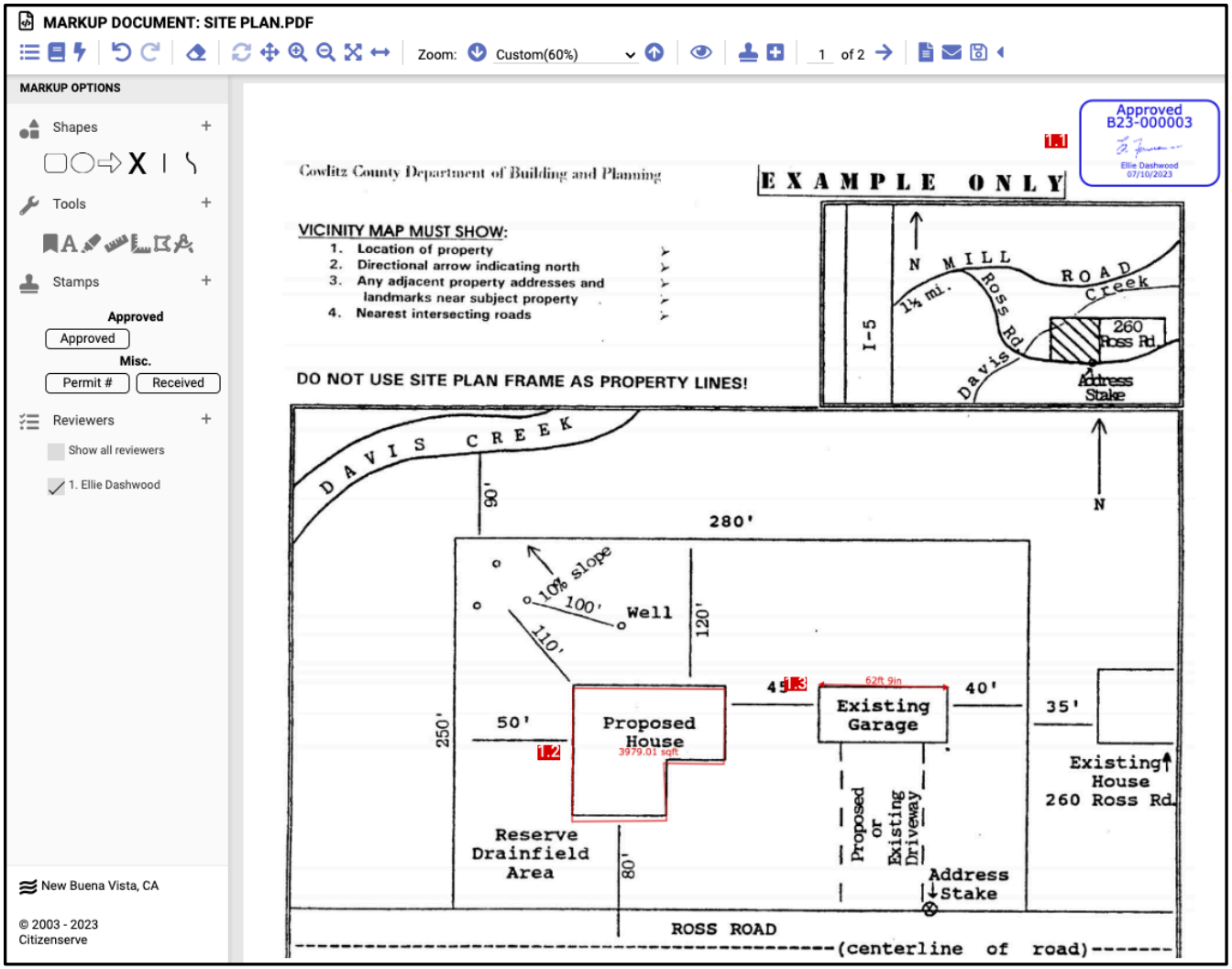
You can create customized workflows that mimic your plan review processes. Workflows are flexible and can accommodate conditional, electronic routing of plans based on permit type, address, zoning district, valuation, or other attribute. Tasks can be routed to a specific user or to a departmental queue.

Plan review statuses will be configured to the Town's specifications – for example, Submitted, Under Review, Revisions Requested, Approved, Issued, Inspections Pending, and Closed. Citizenserve enables staff and applicants to digitally and visually track plan review status and comments. Review steps can be configured to occur consecutively or concurrently. Workflow status can be tracked internally by Town staff, with real-time updates, while the applicant can check on the real-time status of a permit or planning application and any associated plan reviews by signing in to the portal.

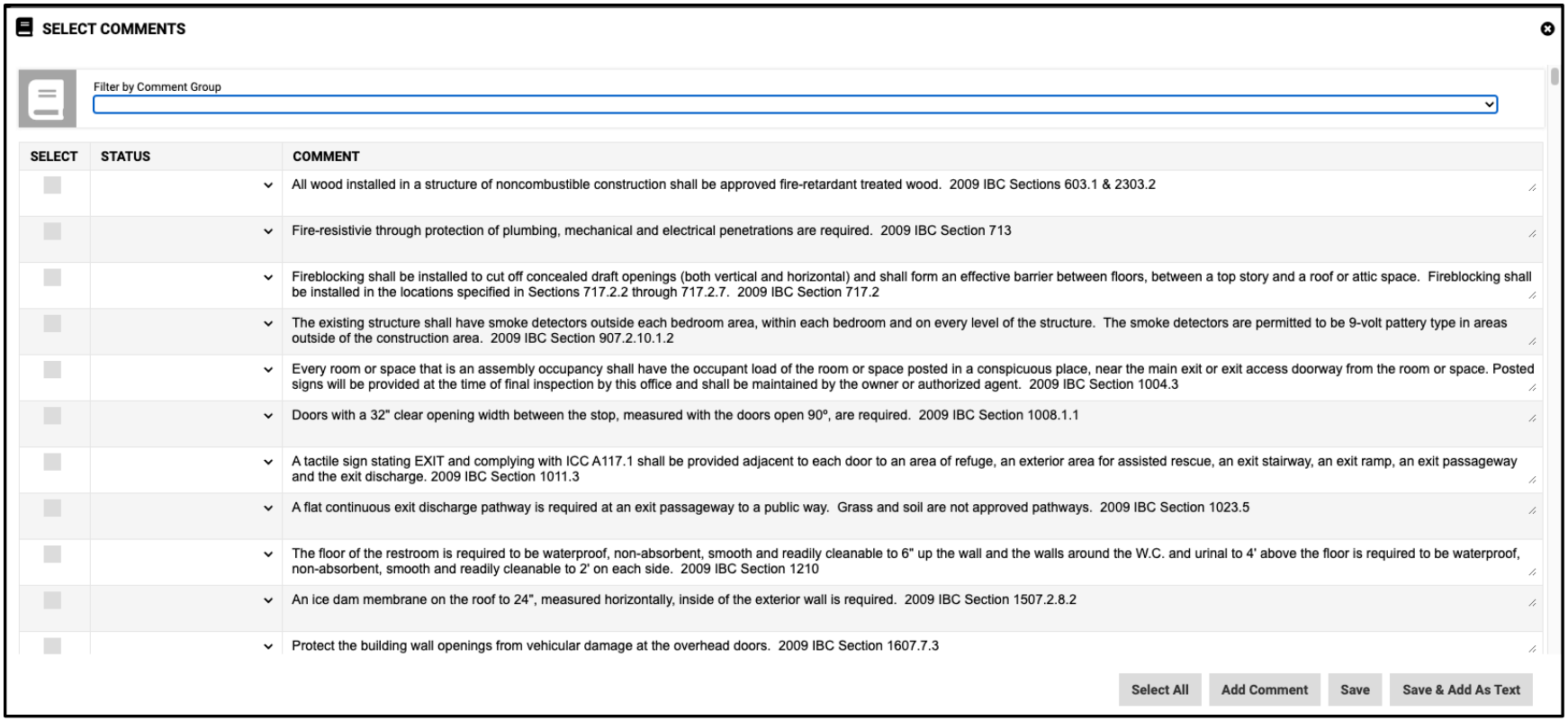
Plan review comments from Town staff are available from the portal, and notifications let your applicants know when a new set of comments and markups are available. Citizenserve accommodates multiple review cycles. We can configure specific statuses such as

"Revisions Requested" with associated email notifications for the applicant. Citizenserve tracks the submission of documents by assigning the document source as 1st Resubmittal, 2nd Resubmittal, etc.

A citizenserve subscription includes an integrated, proprietary markup tool to enable markups for plan reviews. The citizenserve markup tool includes functionality to measure areas and linear distances and accurately scale drawings. The tool supports electronic plan review comments by enabling each user to enter individual notes, highlights, measurements, stamps, and other annotations; the markup shows who made the entry and can filter entries to show layers with all, some, or only a single user's markups.

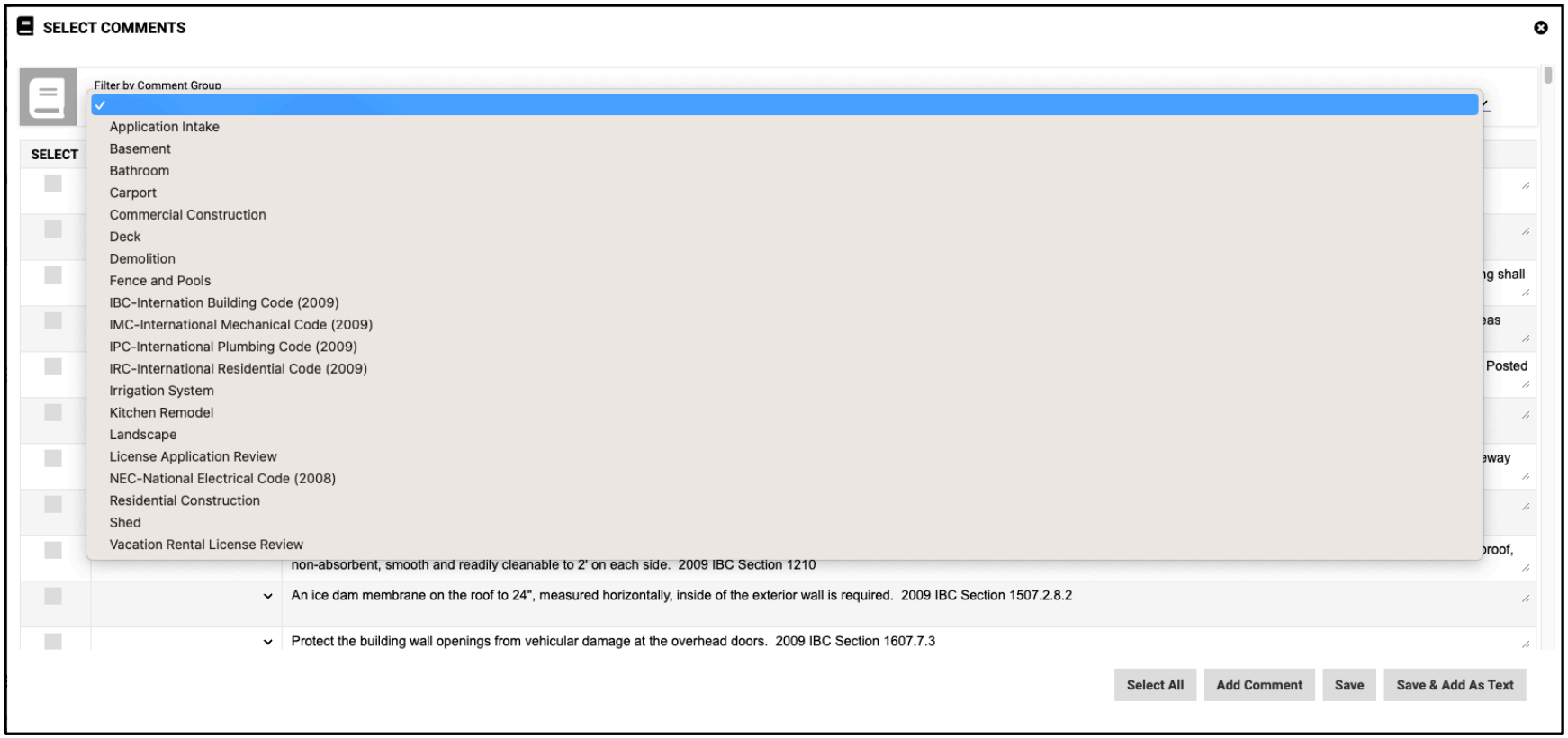


Measure Areas and Linear Distances with Citizenserve's Review Tools

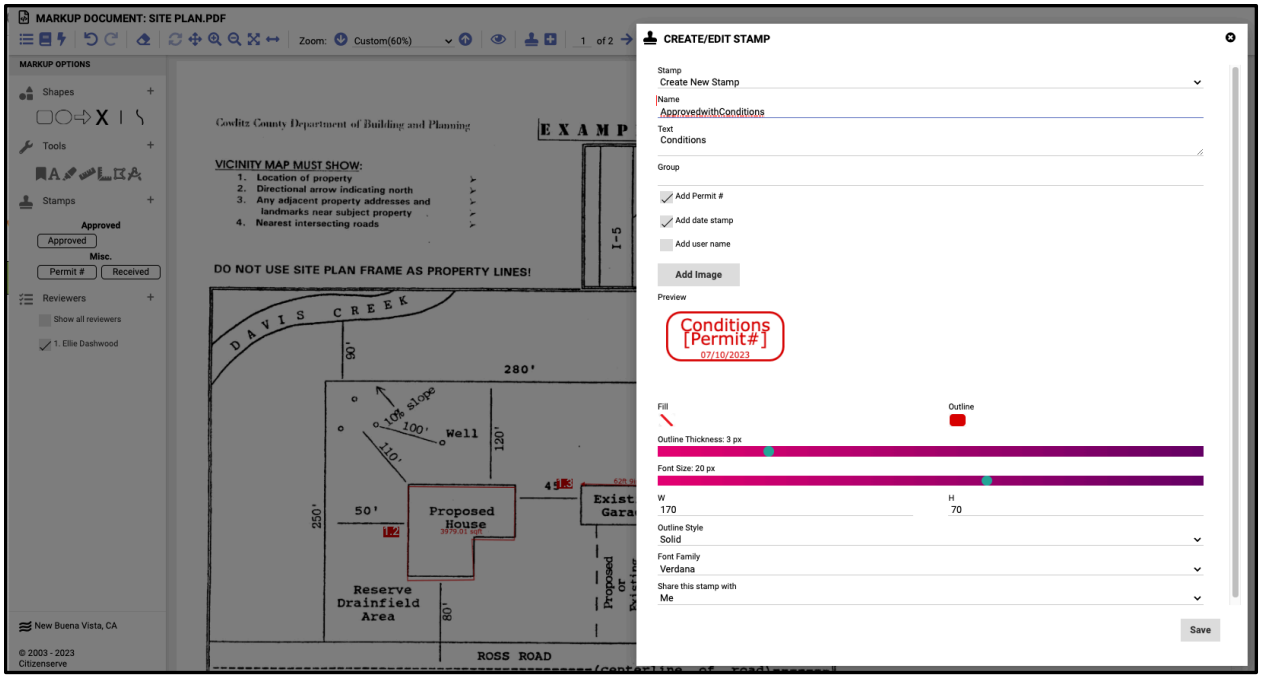


Custom Lists of Electronic Plan Comments, Tied to Applicable Codes

The above figure shows one example of a partial Common Comments Book that has been configured for a building department and tied to specific codes; plan reviewers can quickly select the applicable comments and codes. Plan review comments and associated codes are automatically generated and available to applicants from the portal. The below figure shows one example of comment groups that simplify plan review comment entry.



Create Comment Groups for Easy Selection of Applicable Comments



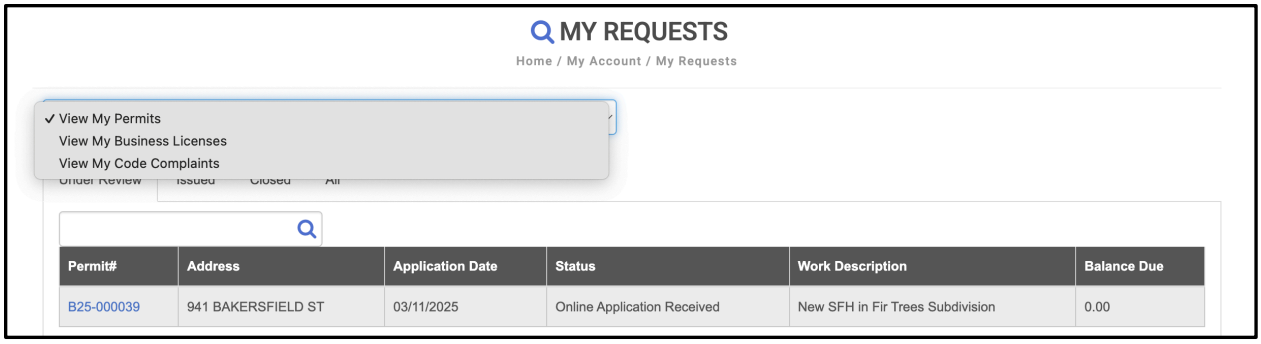
Create and Share Custom Stamps

5.1.1.4 Applicant Communication and Status Monitoring

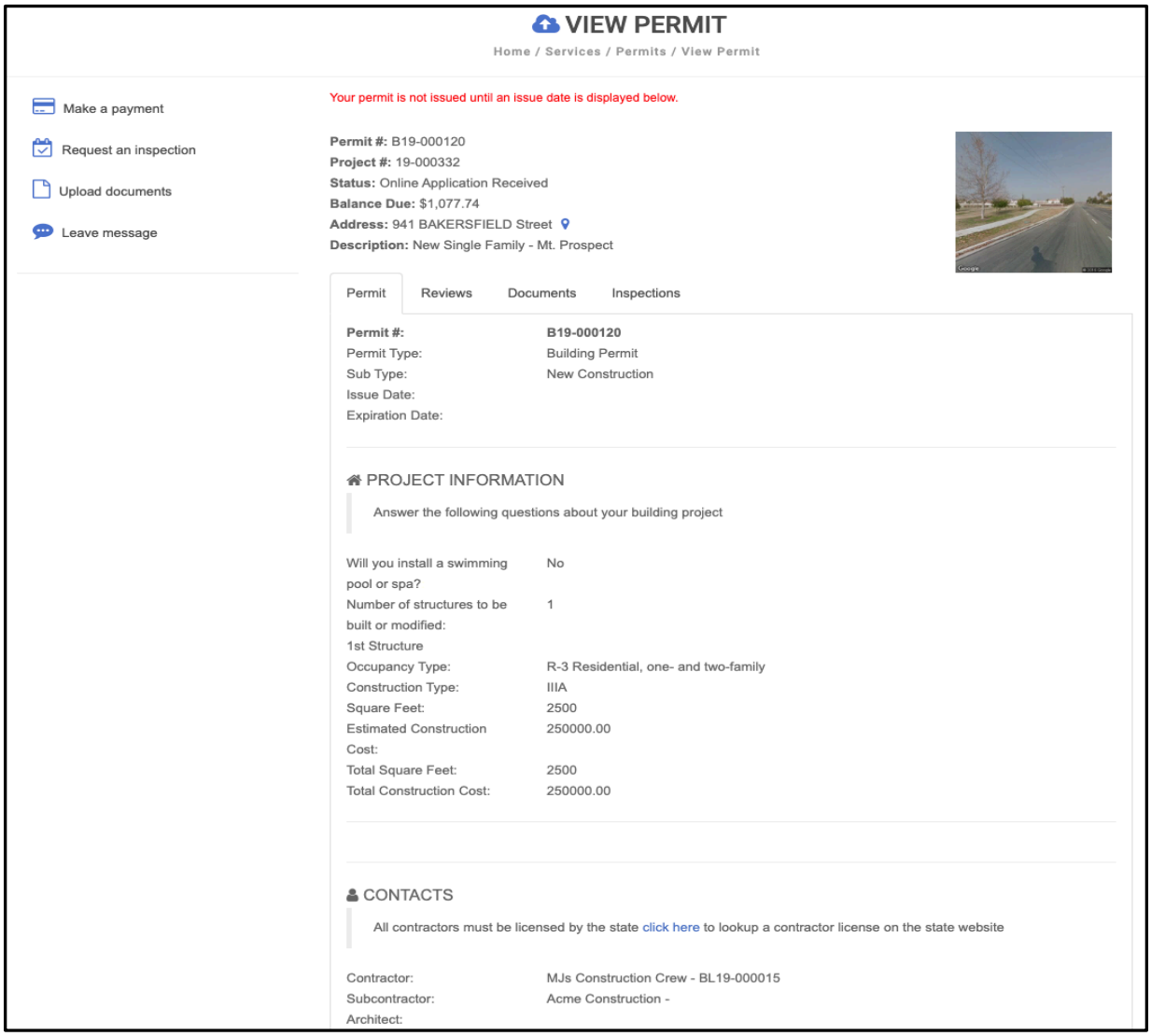
There are a variety of ways staff can communicate with an applicant. The application workflow can be configured to send email notifications at designated points in a workflow; for example, a review activity can be completed and a template email generated to be sent to the applicant and any other people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

Portal users can opt in (or opt out) to text messages from their portal account. Standard message and data rates apply to text messages sent from citizenserve.

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

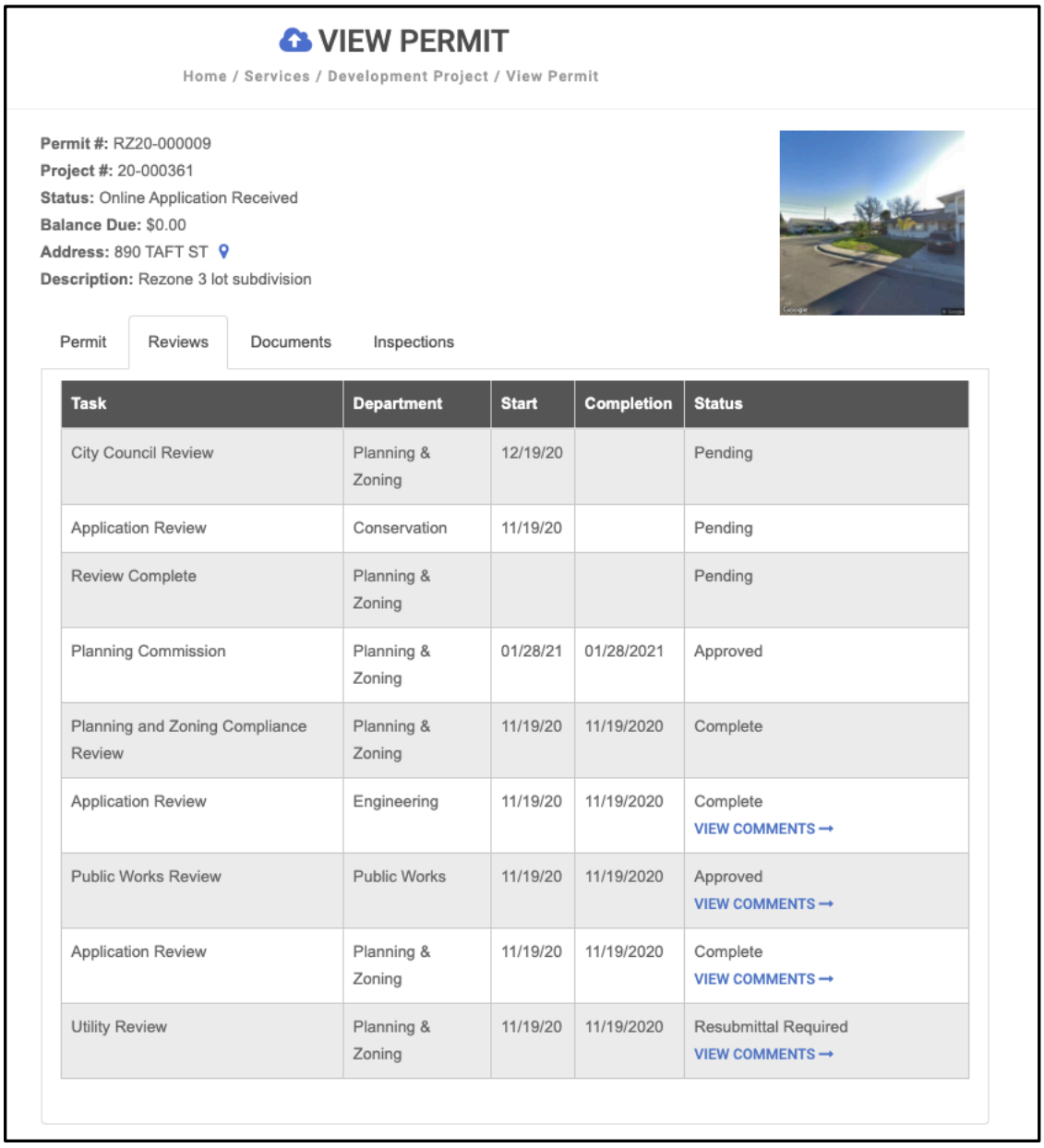


My Requests Screen Available to Customers from the Portal; can be configured to display all configured modules (Permitting, Planning & Zoning, Licensing, Code Enforcement, Request Tracking)



Online Portal View Permit Screen

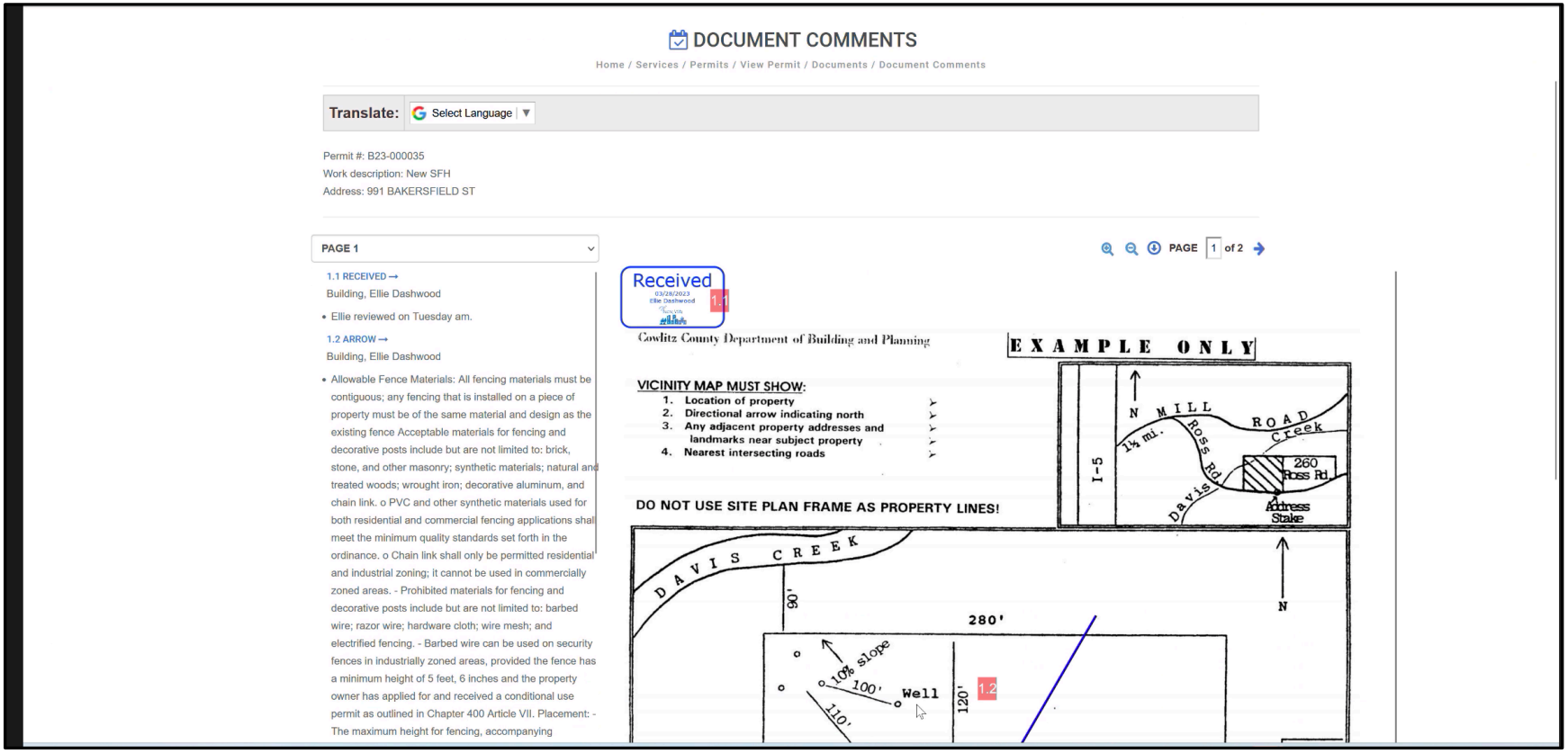
The above screenshot shows a partial view (due to space constraints) of the View Permit screen that is accessible by a customer from the portal; the tabs for Permit, Review, Documents, and Inspections show the status and other information that is available to the applicant. It's easy for staff and customers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



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

Reviews Tab on the Portal

It's also easy for an applicant to identify and access review comments. The above screen shows the Reviews tab that an applicant has accessed from the portal for a rezoning permit; the blue VIEW COMMENTS hyperlinks indicate there are comments from the Engineering Application Review, Public Works Review, and Planning & Zoning Application Review. Clicking on a hyperlink displays the comments; comments can also be viewed for all reviewers simultaneously, if desired.

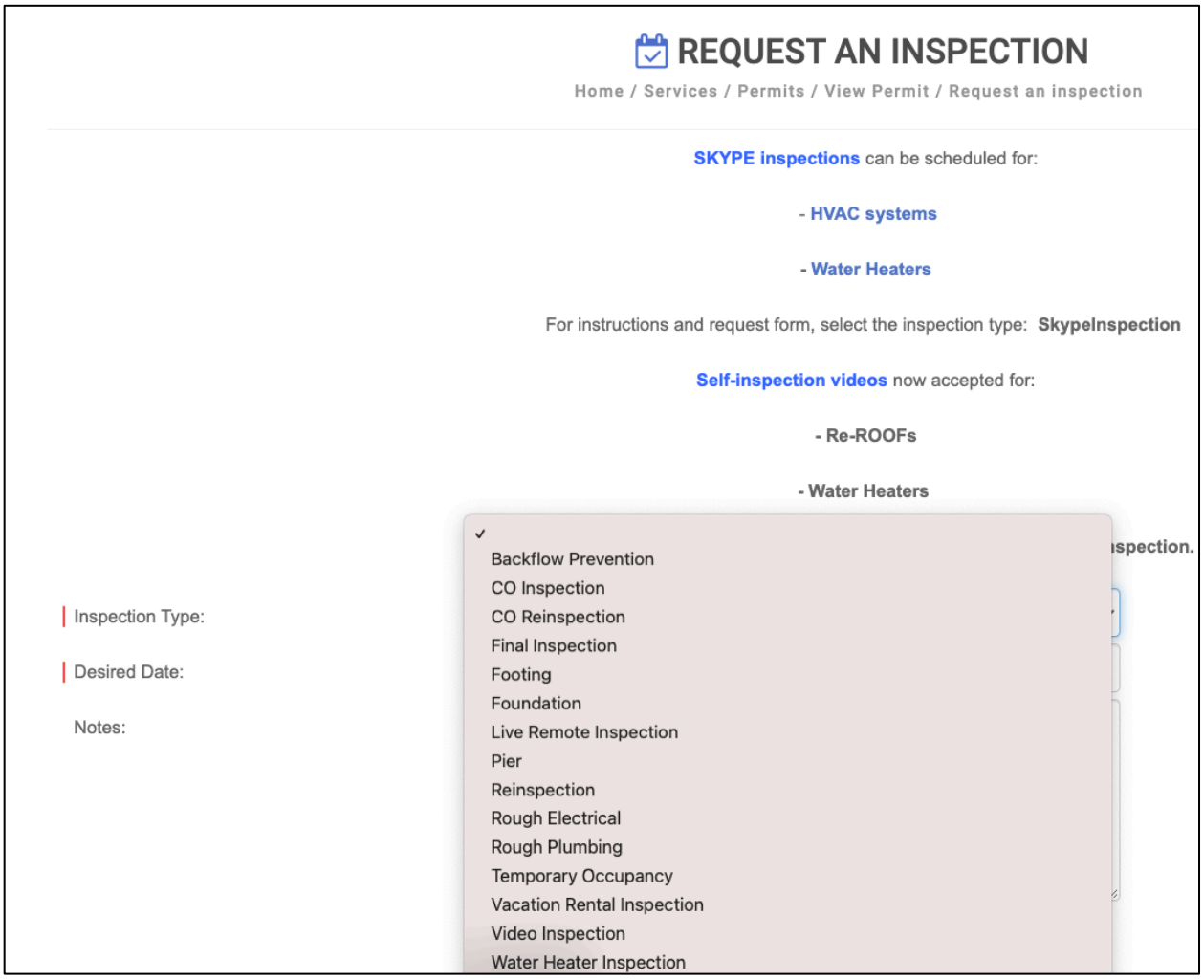


The applicant clicks on the VIEW COMMENTS link to view the stamp, shapes, and comments added by review staff.

5.1.1.5 Inspection Scheduling and Tracking

Citizenserve provides a single point of inspection scheduling and tracking. Customers can request inspections from the portal or via text; inspections will not be scheduled until staff approve the request. Customers can select the desired date and time range of the inspection. Automatic notifications of inspection requests can be configured.

Citizenserve has a built-in device and browser independent calendar feature that allows inspections and tasks to be easily assigned, scheduled, and managed. Inspectors can select a calendar integration setting to email them a calendar invitation when an inspection is scheduled. The email contains an ICS file that adds an appointment to the inspector's Outlook or Google calendar. Citizenserve also includes options to allow email and text notifications to be sent to contractors when inspections are scheduled.



Customers can request an inspection from the portal; the inspection types are customizable (building inspection types shown)



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

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

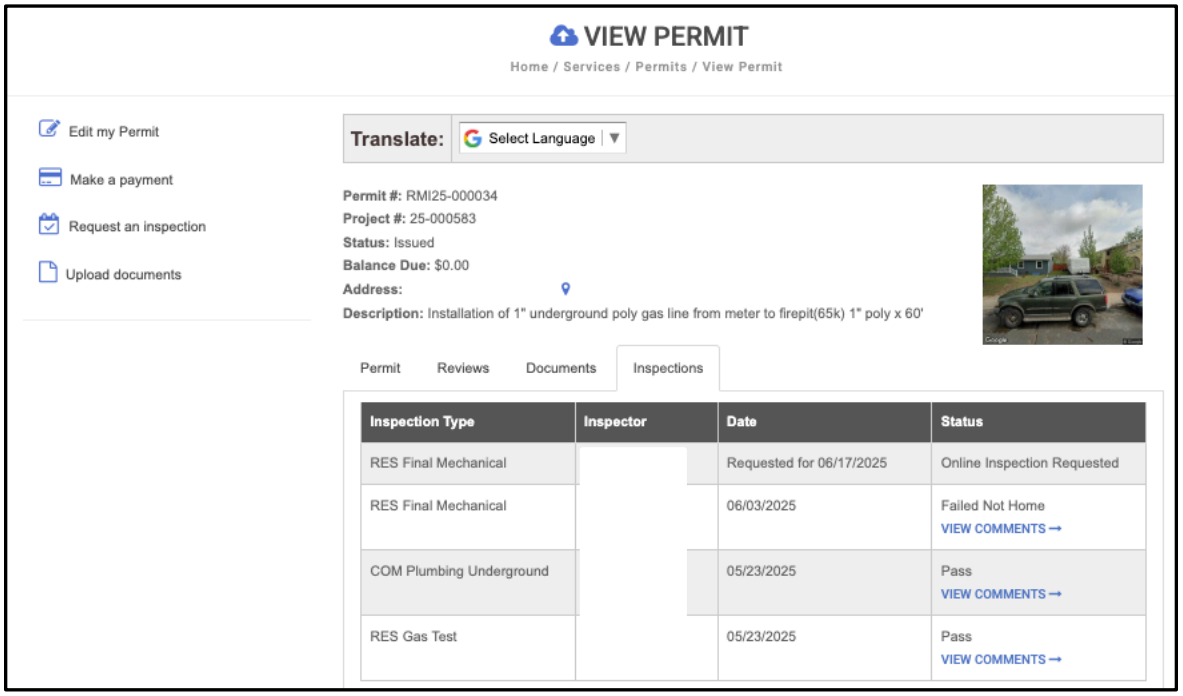
Citizenserve is device and browser independent, so your inspectors can access the full functionality of citizenserve from the field from any device (iOS, Android, etc.) that has a modern web browser, such as a tablet or mobile phone. Any information entered in the field is immediately available to staff in the office, and vice versa; no synching of data is required. Citizenserve enables GPS location capture and voice-to-text data entry from devices that support these functions.

Inspectors are notified of inspections due and can look up property ownership information; fill out an inspection report; add violations; take and attach photos; mark up images; generate and email field notices, citations, and inspection reports; and schedule re-inspections in the field

from any mobile device. Your inspectors can print notices and other documents using a Bluetooth printer. Photos can be taken and added directly from device cameras.

Our offline inspection mode enables inspectors to conduct inspections in the field, even when there is no connectivity. Data is automatically synched when connectivity is re-established.

Applicants can track their permit inspections from the portal from the View Permit screen. Clicking on the Inspections tab displays all inspections related to the permit, assigned inspector, the date, and the inspection status. Once the inspector has completed the inspection, the applicant can click on the blue **VIEW COMMENTS** link to access the inspector's comments.



The Inspections tab from the Portals' View Permit screen displays all inspections for the permit

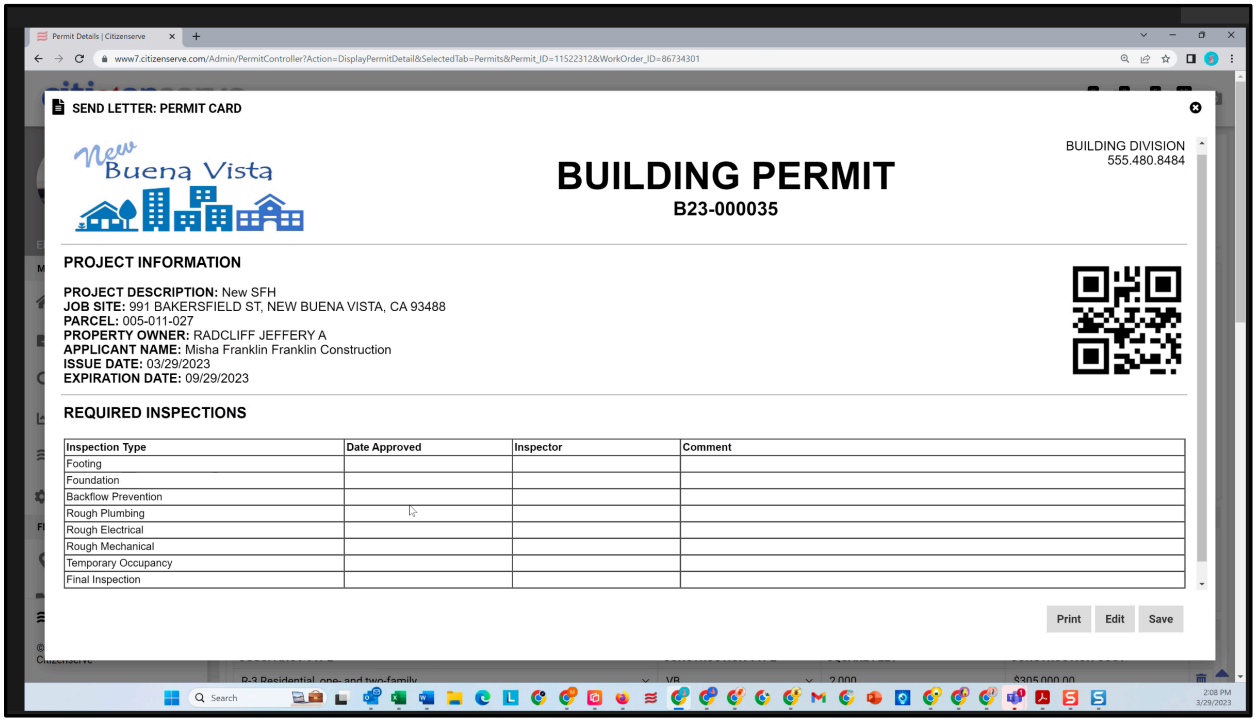


Clicking on the VIEW COMMENTS link opens the inspector's comments

5.1.1.6 Permit Document Issuance

An unlimited number of permit documents can be created, including approval letters, deficiency letters, permit cards, Certificates of Occupancy, etc. Documents can be automatically generated based on custom conditions (e.g., when a permit status is changed to Issued) and inspectors can generate documents from the field that are automatically attached to the case, including photos, notices of violation, certificates, or other documentation generated during an inspection. Any document can be generated in the field and emailed using an iPad or other mobile device or printed with a Bluetooth printer.

The Citizenserve implementation manager will work with the Town to build all documents that will be issued and identify points in the workflows where the documents are generated and the conditions for issuance. We will include the text, graphics, and fields required by the Town; we can either replicate existing documents or can use the existing document as a starting point and include changes. Documents such as the permit card can be designated to be placed on the portal so the applicant can download, review, and print them.



Documents such as the permit card can be placed on the portal for easy access by the applicant

5.1.2 Planning & Zoning Module

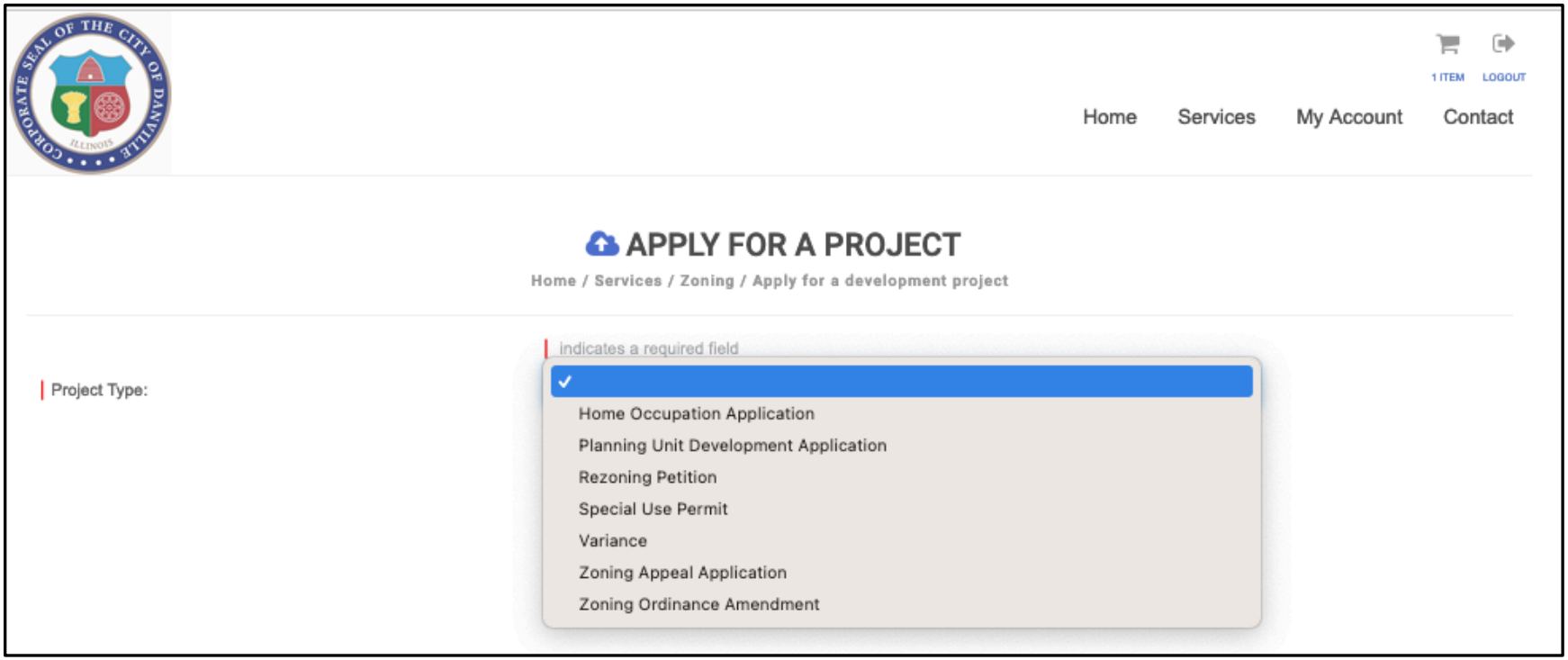
Citizenserve planning & zoning software completely automates the processes associated with application, review, routing, inspections, resubmittals, and public notification. An unlimited

number of application types can be created. Applicants can submit applications that include multiple parcels and addresses, attach site plan documents, securely pay application fees, view the status of their applications, and provide resubmittals and associated documents through the online portal. Citizenserve tracks the date and time of each plan submission.

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

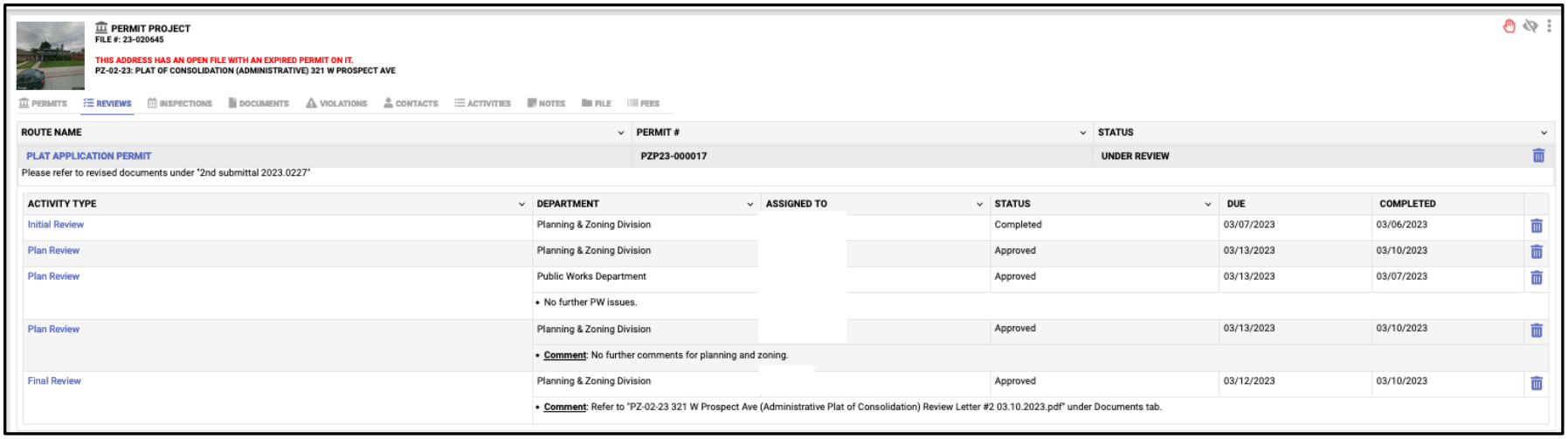
Plan reviewers have access to searchable electronic reference materials including building code handbooks, GIS layers, and property history. Citizenserve's review notifications work the same for the permitting and planning & zoning modules; applicants are notified when reviews are completed and review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

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



Public Portal for a Citizenserve Customer – Zoning Application Types

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



PERMIT PROJECT
FILE #: 23-020645

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

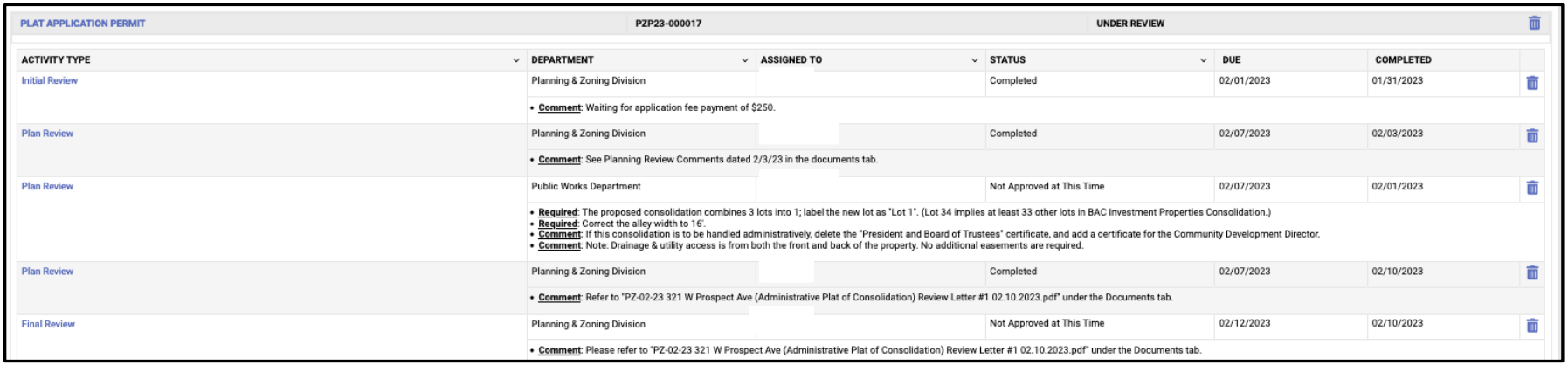
PERMITS | REVIEWS | INSPECTIONS | DOCUMENTS | VIOLATIONS | CONTACTS | ACTIVITIES | NOTES | FILE | FEES

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

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

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

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



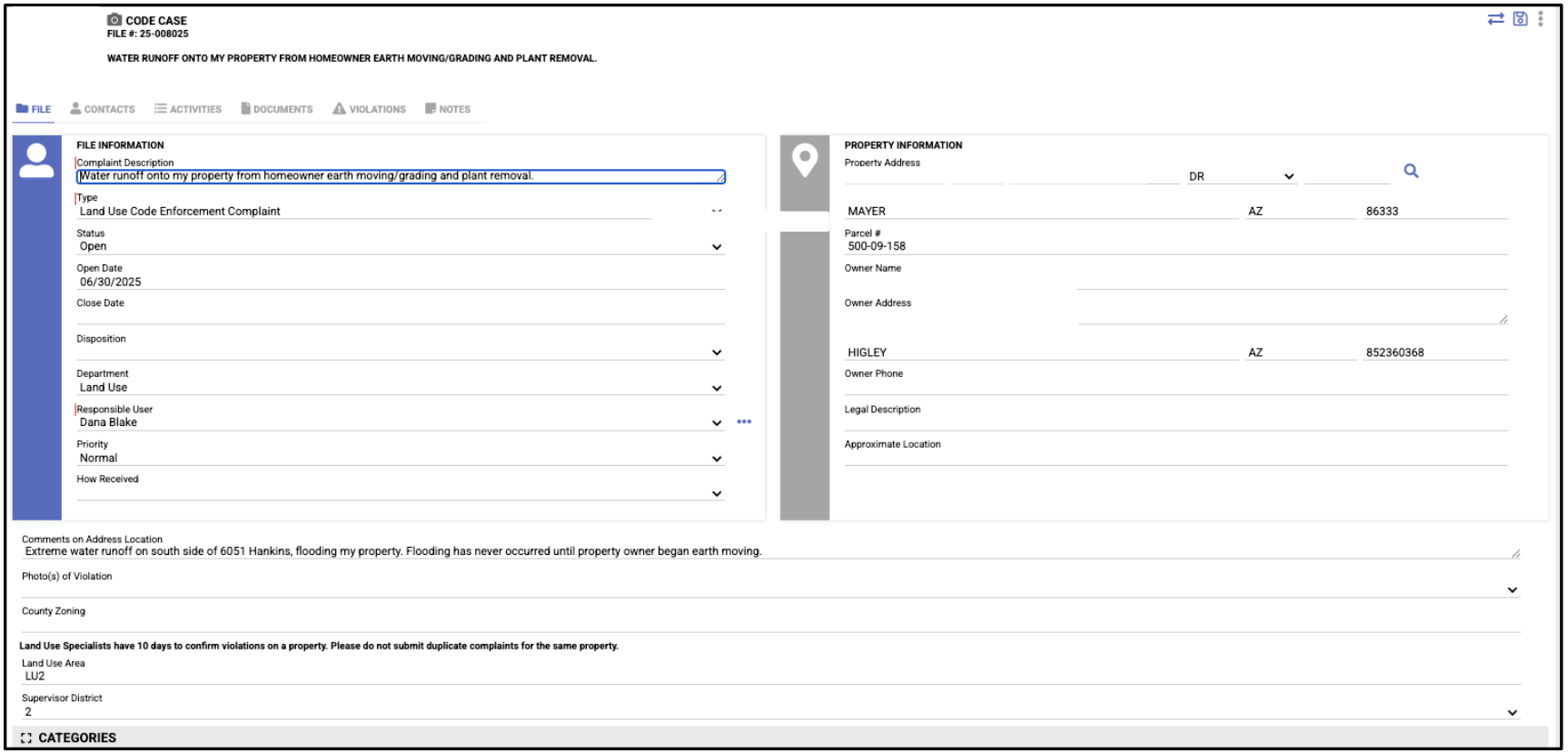
PLAT APPLICATION PERMIT	PZP23-000017	UNDER REVIEW

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

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

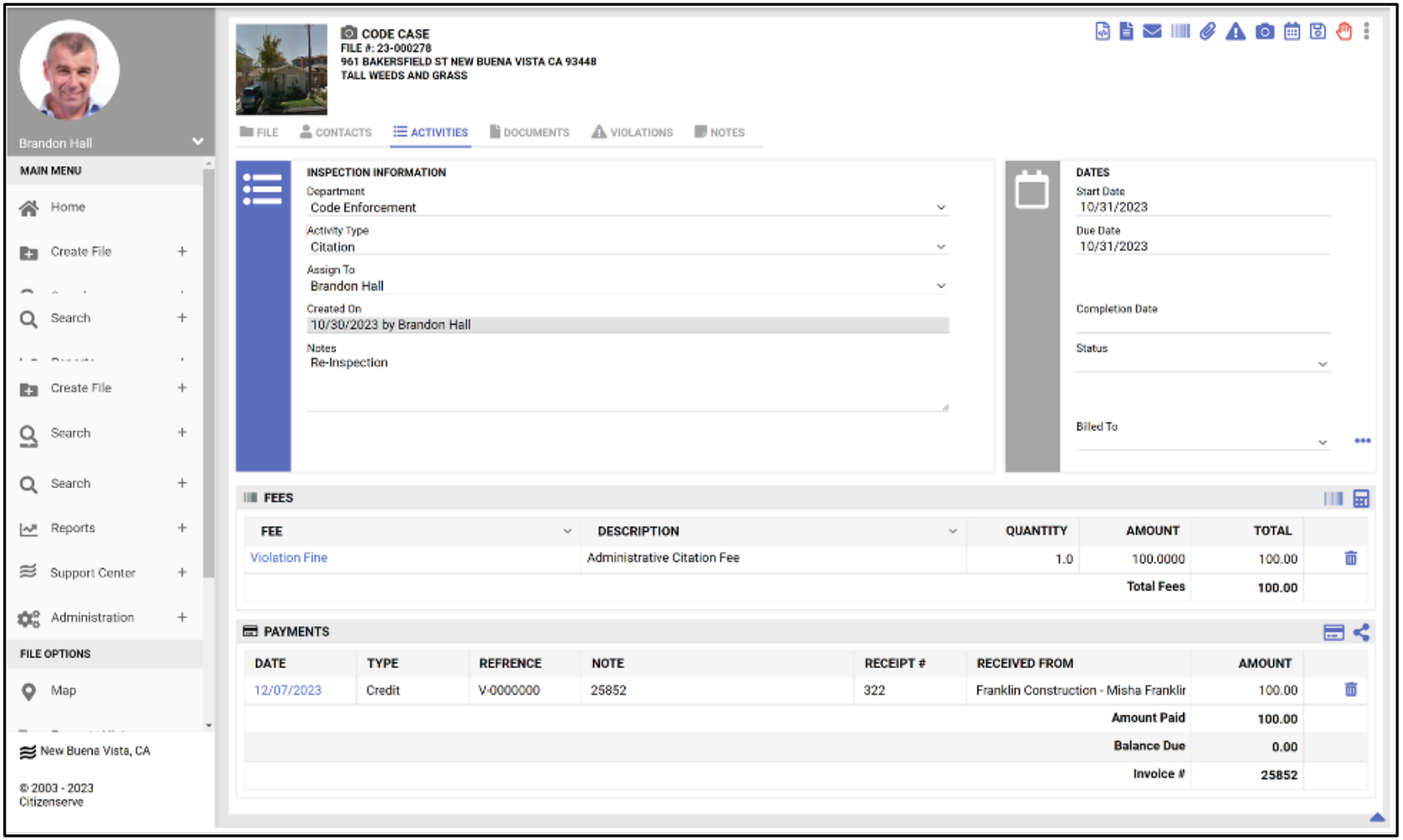
5.1.3 Code Enforcement Module

Citizenserve code enforcement software completely automates the process of routing complaints, opening cases, scheduling inspections, recording violations, generating case forms, and coordinating resolutions. Citizens can enter complaints and check on the status from the online portal, or staff can take complaints over the phone or from the counter and enter the relevant information. Citizenserve supports anonymous complaints through a configuration option.



Citizenserve's tab structure provides easy access to all code enforcement case information, including complaints, activities and inspections, documents and photos, violations, and all related data (identifying details obscured).

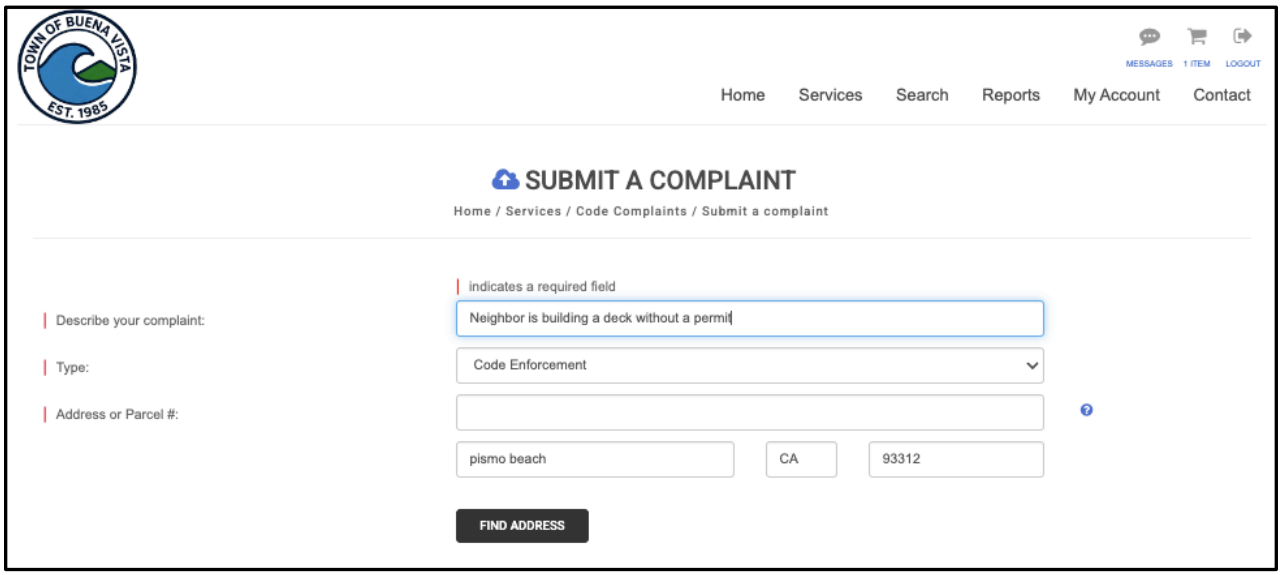
Staff users can view the details of payments made for fees and fines from the Fees and Payments screen.



The Fees and Payments screen shows fees, fines, and refunds and associated payments

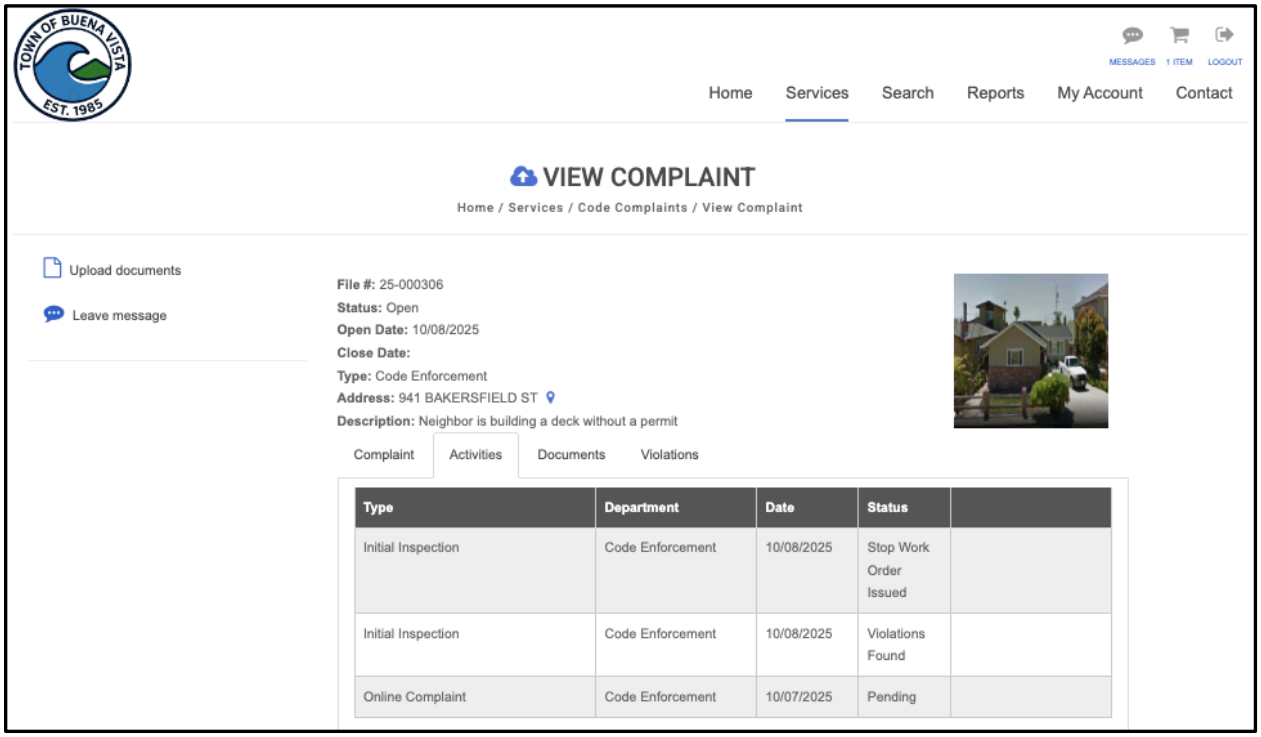
Complaints can be routed to the appropriate department automatically. Citizenserve enables the tracking of code enforcement cases through a municipality's full life cycle, such as complaints, intake, inspections, case management, violations, appeals and appeal hearings, abatement, cost recovery, and all related communications.

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



Public portal users can submit complaints from the portal (can be configured to allow anonymous complaints)

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

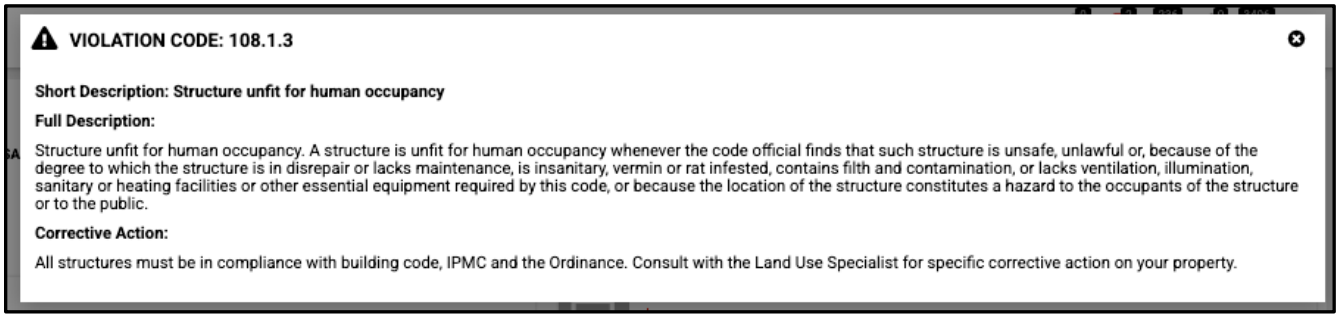


Complainants can access the status of the code case from the portal

Code inspections can be scheduled automatically according to complaint type, added to an unassigned queue for code inspectors, or can be added manually. The Town's code cases can be assigned according to the Town's business processes; for example, cases could be assigned to inspectors based upon geographic attributes provided through integration to the Town's GIS, assigned to specific code inspectors by complaint type, or added to a queue for inspectors to assign to themselves.

Citizenserve is device and browser independent – the full functionality of the software, including the online portal, is available from any mobile device. As a fully mobile solution, code enforcement inspectors are notified of inspections due and can look up property ownership information; enter their findings from an inspection; add violations; add freeform notes; take and attach photos; generate tickets, notices of violation, warnings, or citations; close violations after verifying the required fix; and schedule re-inspections – all in the field from a tablet or laptop. Enforcement documents and forms can be generated in the field using an iPad or other mobile device and Bluetooth printer. Our offline mode enables your code inspectors to conduct inspections, even in areas with unreliable connectivity.

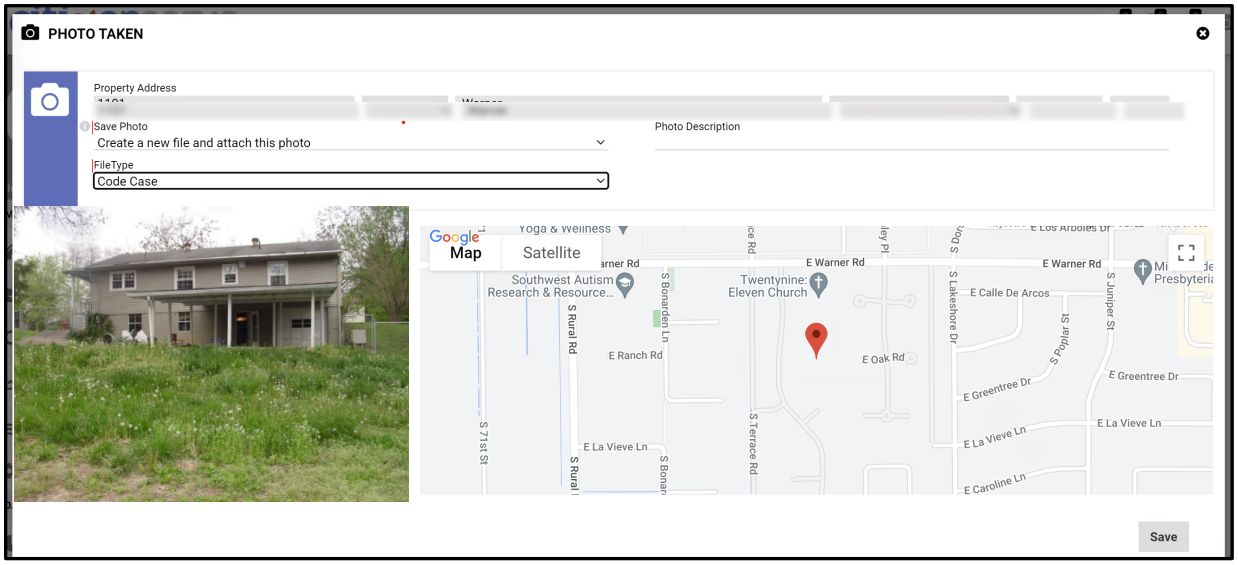
We can populate the Town's violations to include the language from the Town's ordinances. Maintenance of violations and ordinances is included with every subscription. The below screenshot shows an example of ordinance language for a code violation for Yavapai County, Arizona, including the Short Description, Full Description, and Corrective Action.



Ordinance language for a code violation for Yavapai County, Arizona



Citizenserve's quick access camera function enables users to take photos in the field, with location enabling technology.



Example of a photo taken by a code enforcement officer from the field.

We have included integration to a payment processor to enable fees and fines to be paid from the portal; they can also be paid in person if the Town's business processes allow. Similar to the permitting module, we will configure an unlimited number of custom reports and metrics to track outstanding payments and payment reconciliation.

We will be rolling out an integrated AI inspection tool, AIME, by the end of the year that reduces the amount of time required for code inspections and increases data entry accuracy. Demonstrations of AMIE are available now.

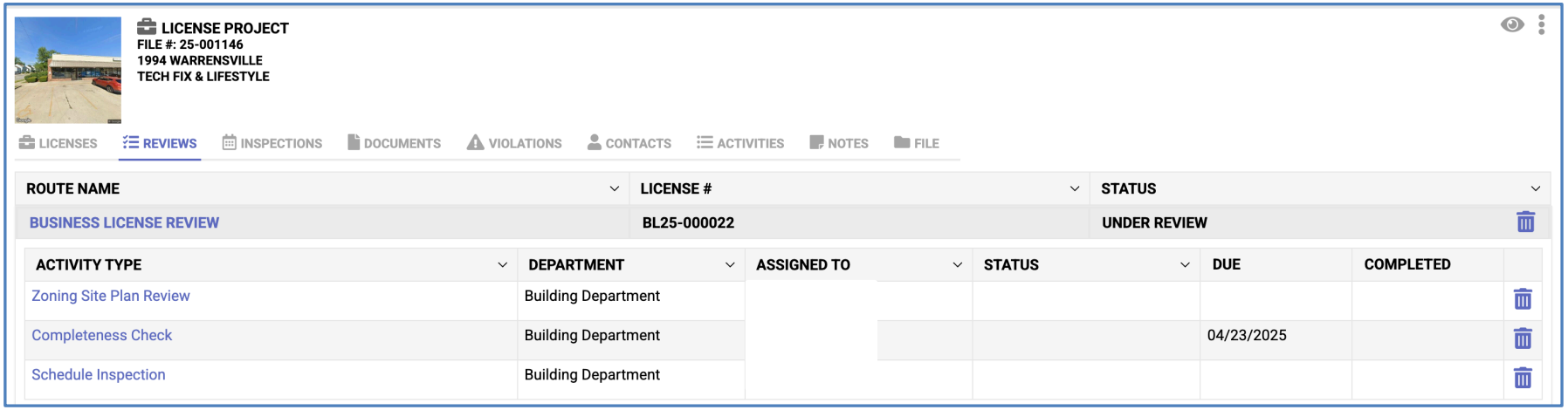
5.1.4 Licensing Module

Citizenserve licensing software automates the application, fee generation, payment, review, and renewal of any license, including contractor, business, rental housing, and health licenses. Applicants can submit applications, upload copies of required documents, check on the status of applications, securely pay application fees, request inspections if applicable, and download and print their licenses and certificates through the citizenserve online portal.

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

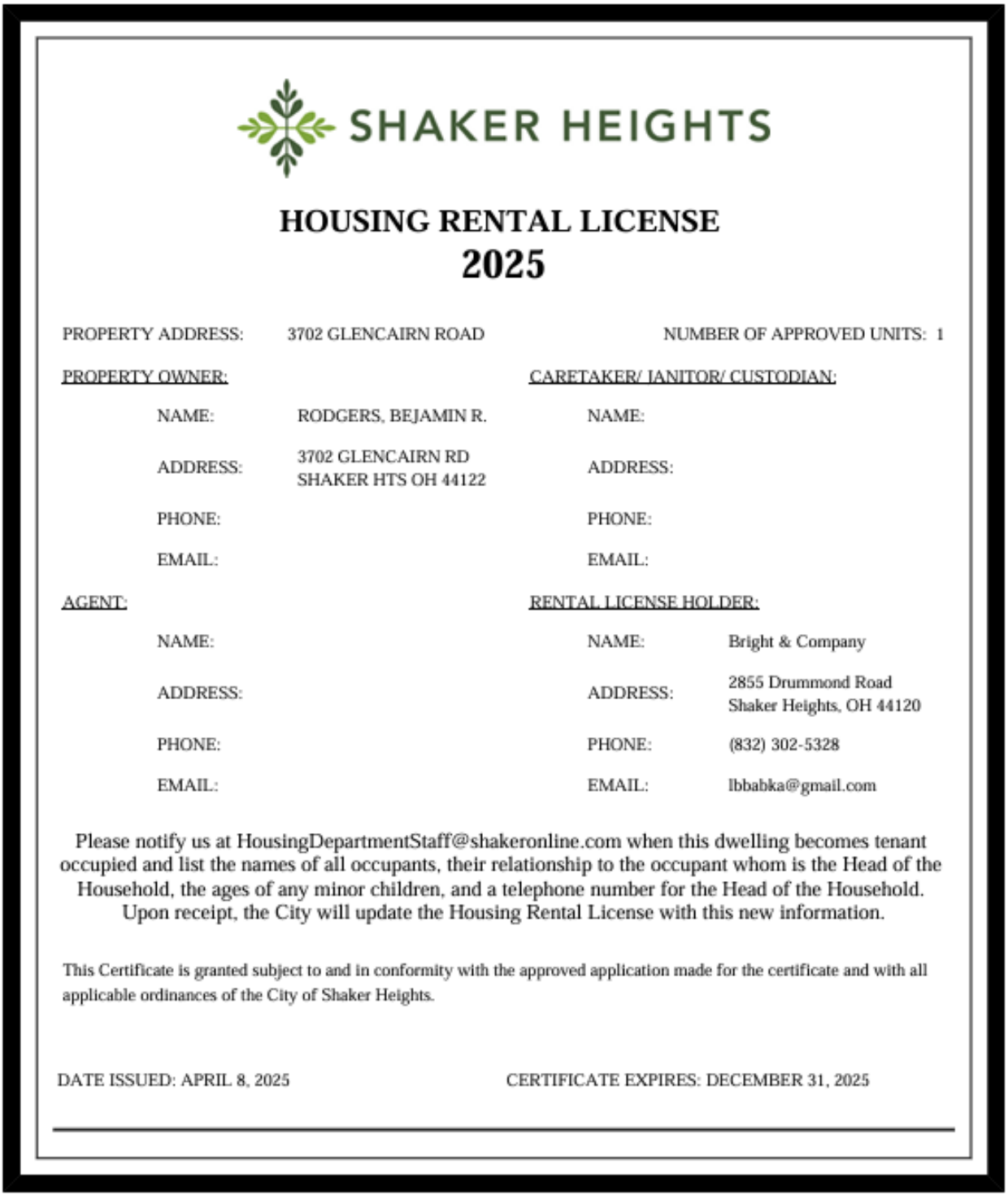
We are currently working on a rental licensing tool as part of our Automated Municipal Intelligence Engine (AMIE) that can identify unregistered rental housing. The tool is expected to aid customers in identifying and recovering registration fees from rentals that are not compliant with municipal registration and licensing requirements.

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



Staff View of a Business License Workflow Route Display with Details (identifying details whited out)

When it comes time for renewal, you can create batch email or mail renewal notices quickly. Custom renewal processes can be created, and renewal letters can direct business owners to the online portal for renewal and payment. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewals.



SHAKER HEIGHTS

HOUSING RENTAL LICENSE
2025

PROPERTY ADDRESS: 3702 GLENCAIRN ROAD NUMBER OF APPROVED UNITS: 1

PROPERTY OWNER:		CARETAKER/ JANITOR/ CUSTODIAN:	
NAME:	RODGERS, BEJAMIN R.	NAME:	
ADDRESS:	3702 GLENCAIRN RD SHAKER HTS OH 44122	ADDRESS:	
PHONE:		PHONE:	
EMAIL:		EMAIL:	

AGENT:		RENTAL LICENSE HOLDER:	
NAME:		NAME:	Bright & Company
ADDRESS:		ADDRESS:	2855 Drummond Road Shaker Heights, OH 44120
PHONE:		PHONE:	(832) 302-5328
EMAIL:		EMAIL:	lbbabka@gmail.com

Please notify us at HousingDepartmentStaff@shakeronline.com when this dwelling becomes tenant occupied and list the names of all occupants, their relationship to the occupant whom is the Head of the Household, the ages of any minor children, and a telephone number for the Head of the Household. Upon receipt, the City will update the Housing Rental License with this new information.

This Certificate is granted subject to and in conformity with the approved application made for the certificate and with all applicable ordinances of the City of Shaker Heights.

DATE ISSUED: APRIL 8, 2025 CERTIFICATE EXPIRES: DECEMBER 31, 2025

Shaker Heights, Ohio Rental Housing License

CITY OF SOMERVILLE
Commonwealth of Massachusetts
93 Highland Avenue
Somerville, MA 02143
(617) 625-6600

BUSINESS LICENSE RENEWAL NOTICE

Date:	02/11/2025
License #:	BL23-000141
File #:	23-025634
Fee:	605

Dear Holder of the :

It is time to renew your Garage License.

* If you are closing or have closed your business, let me know so I can update our records.
* Don't try to conduct business without renewing your license or you will be subject to fines and penalties.

To renew by mail: Follow the instructions on the enclosed "**Time to Renew Your Business License**" form.

Or, to renew online: go to **www.somervillema.gov/citizenserve**. Then:

1. Click "**citizenserve**" to enter the CitizenServe portal.
2. Select "**My Account**" on the top right-hand side of the page.
3. **Log in** using your username and password. Use the FORGOT YOUR USERNAME/PASSWORD links if you can't log in.
4. Click on "**View My Requests**" on the left-hand side of the page. If you don't see license number #**BL23-000141** on the list, try a different username or password. You may have several accounts in CitizenServe.
5. Contact me if you still can't find this license. Otherwise, click on license number #**BL23-000141**.
6. Click on "**Renew your License**" on the left-hand side of the page.
7. **Verify that the online license information is up-to-date**. Make any needed corrections. If you want to change a field that's gray and can't be changed, contact me as soon as possible.
8. **Attach any documents** that are required, such as proof of Workers Compensation insurance and an updated bond or Certificate of Insurance (for a Constable, Open Air Vendor, Outdoor Seating and Goods, Used Car Dealer, Drain Layer, Hawker Peddler, or Livery license).
9. Verify that all of your updated information is correct, then click "**Submit**" at the bottom of the page.
10. **Pay the nonrefundable renewal fee** of $605 using a credit card or bank account (EFT). You will receive a receipt by email.

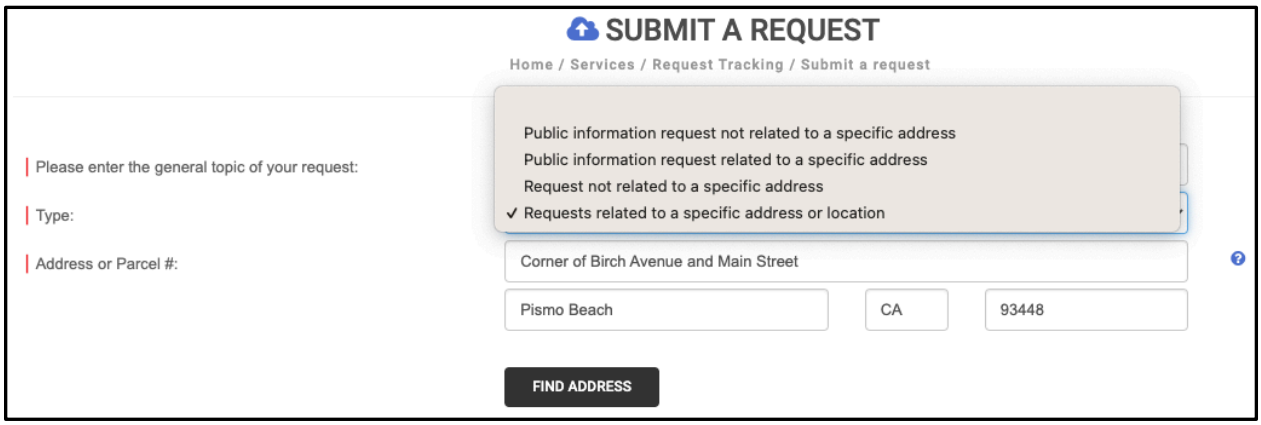
Contact me if you need help, if you want to make changes to your license, or if you want to apply for a new license.

Kimberly M. Wells
City Clerk
(617) 625-6600 x4100
licensing@somervillema.gov

Example Citizenserve business license renewal letter; identifying details are obscured

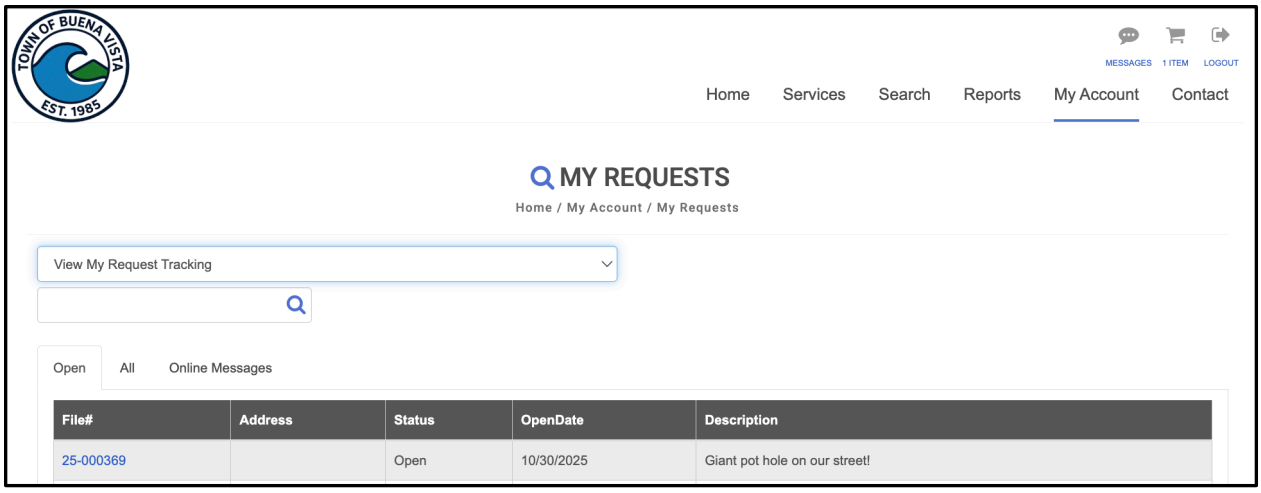
5.1.5 Request Tracking

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



Example of Request Types (fully customizable)

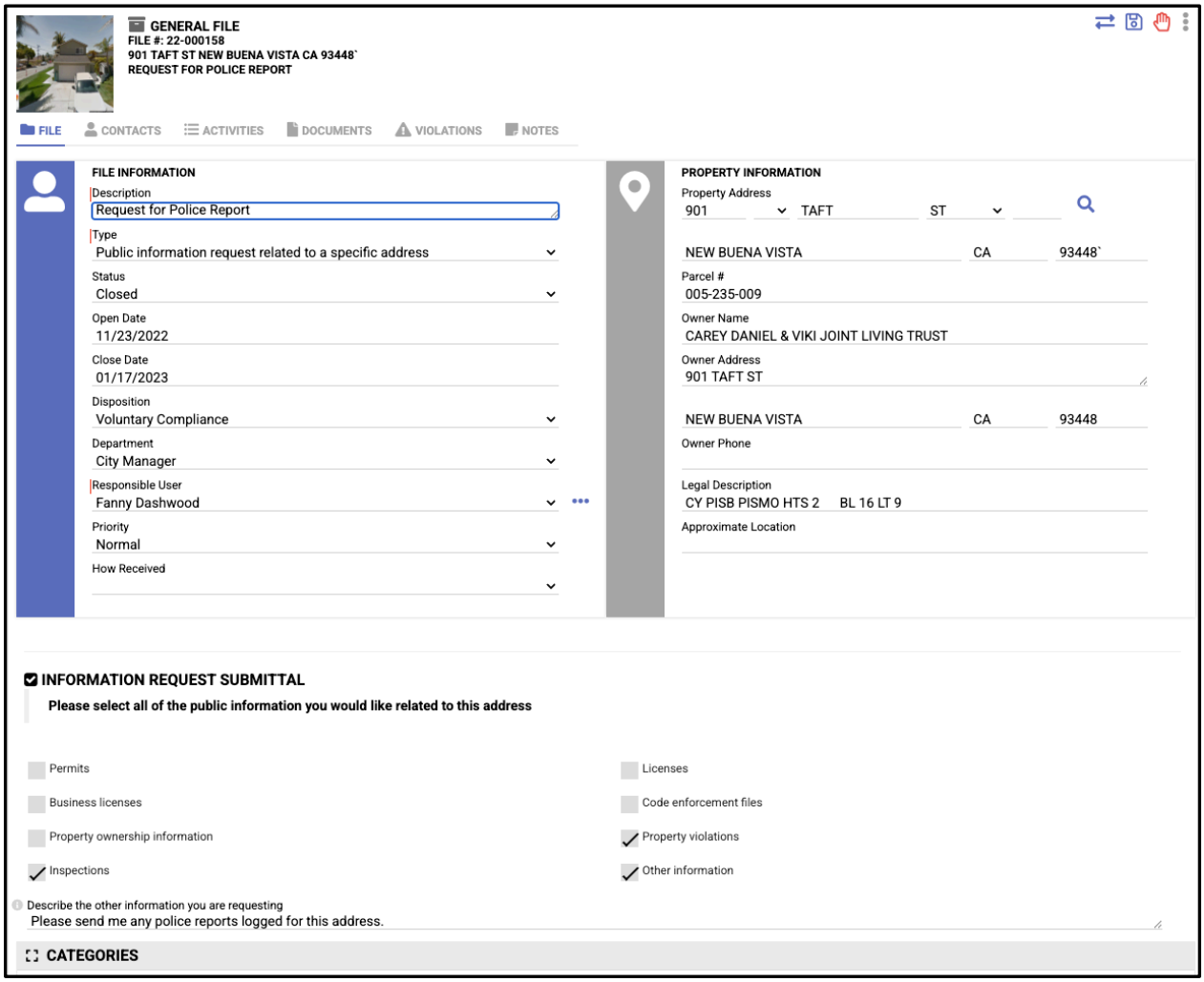
Requestors can track the status of their requests by logging in to the portal and clicking the option for View My Request Tracking. Clicking on the File# opens the related file.



Requestors can access their requests from the portal (service request shown)

We recognize the challenge of producing records for FOIL requests. All documents associated with a case are available from the Documents tab for easy reference. We can configure custom

FOIL report templates for the Town, including options for selecting documents for inclusion in the reports.



Example Public Records Request

5.1.6 Reporting, Dashboards, and Analytics

Citizenserve offers a robust list of standard reports, a flexible reporting wizard for users who want to create and share their own reports, and dynamic dashboards and metrics to provide each user with the specific information required to perform their roles most efficiently.

Reporting

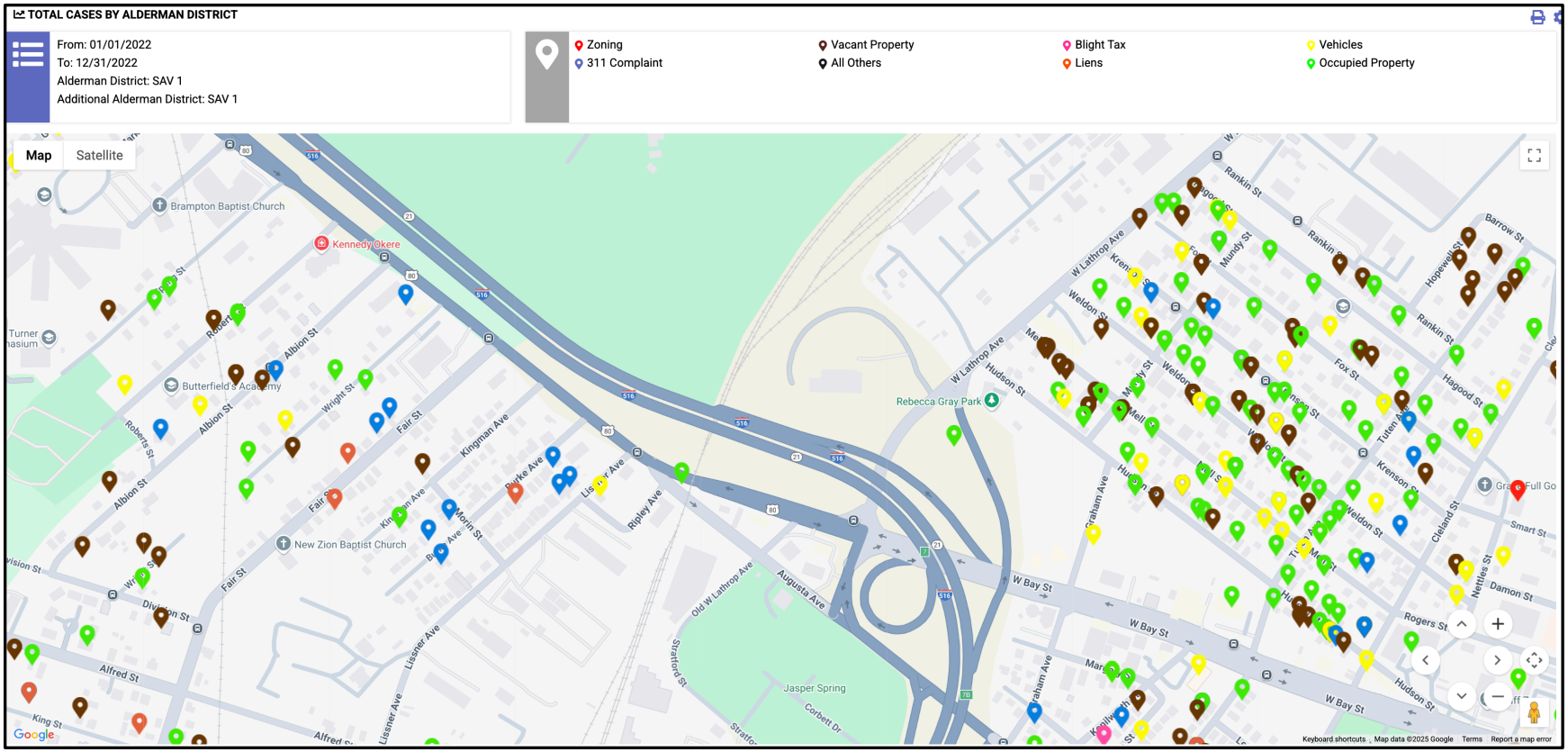
While citizenserve has a robust list of standard reports, most customers request custom reports to meet individual business decisions and processes. The Citizenserve implementation manager will provide guidance to the Town's team members on the iterative process of identifying and designing the reports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

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

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

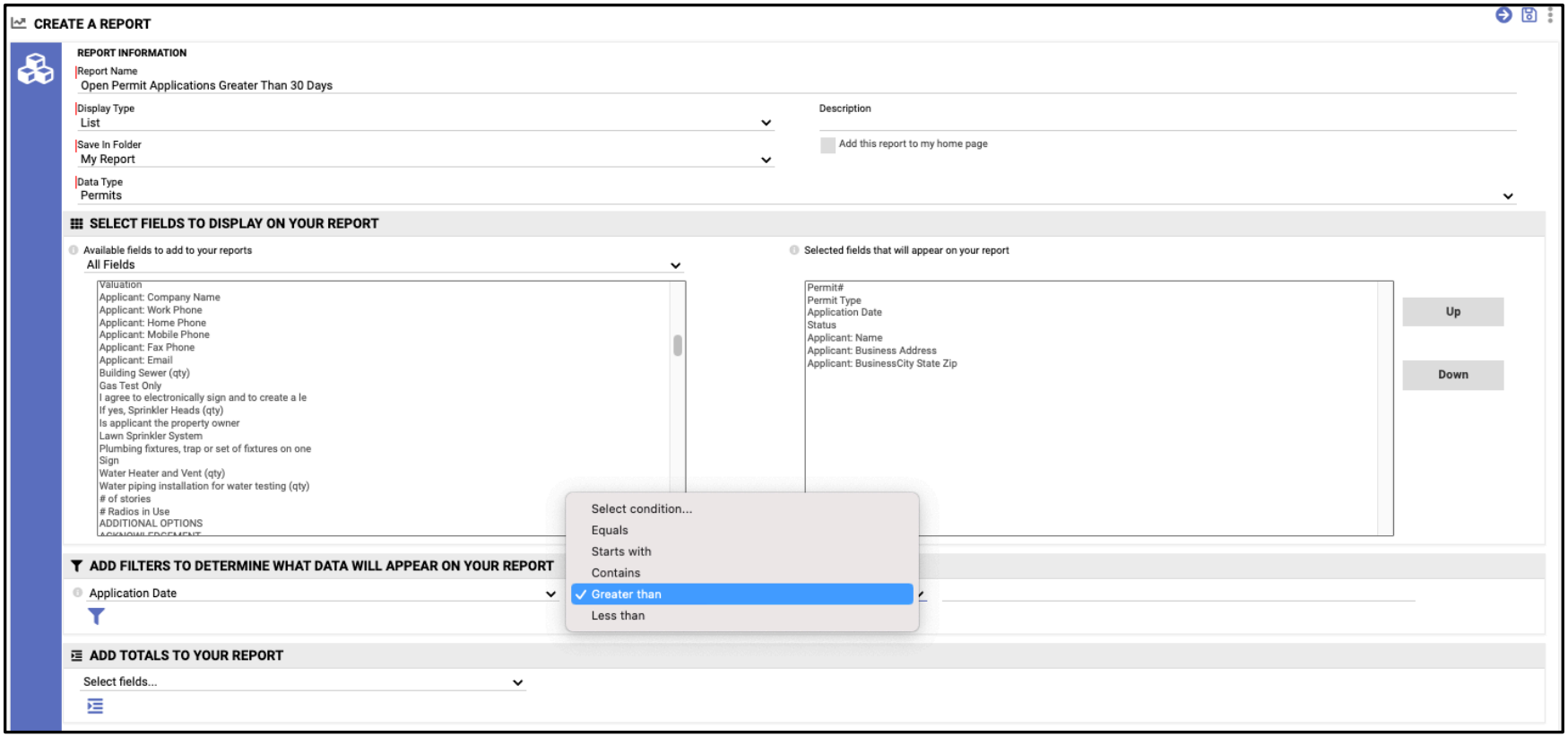
Reports can also be used to create special features, such as a property zoning lookup. Reports can perform processing, such as a report that generates invoices, late fees, or penalties, and can be added to the file. Tabular reports can be exported to Excel format. Any report can be saved as a PDF for archiving. All reports (e.g., open permits map) can be put on the online portal for the public – the Town controls what data is open to the public.

If the Town prefers to use its own reporting and business intelligence tools, we will export the Town's data upon request.



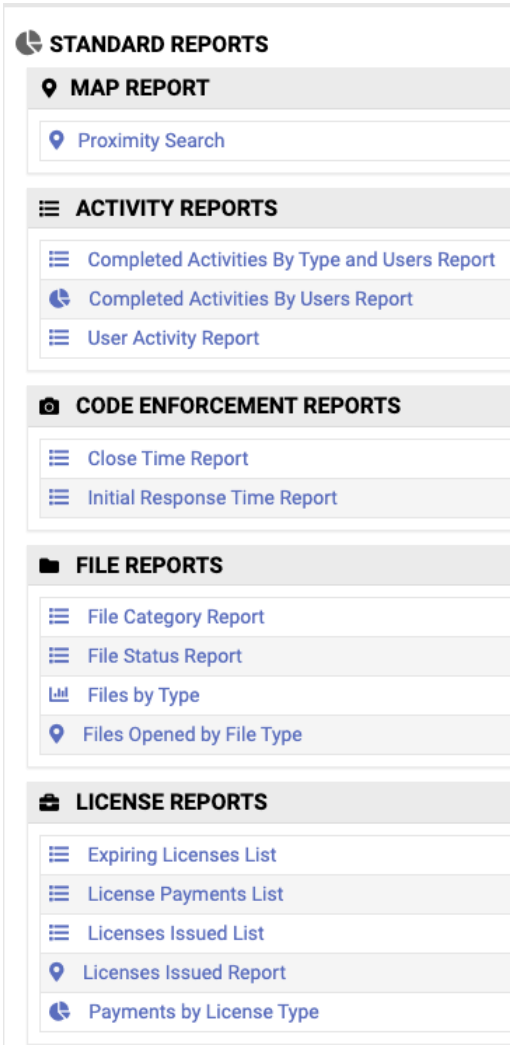
Sample Citizenserve Customer Map Report – Code Cases by District for the 2022 Calendar Year

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

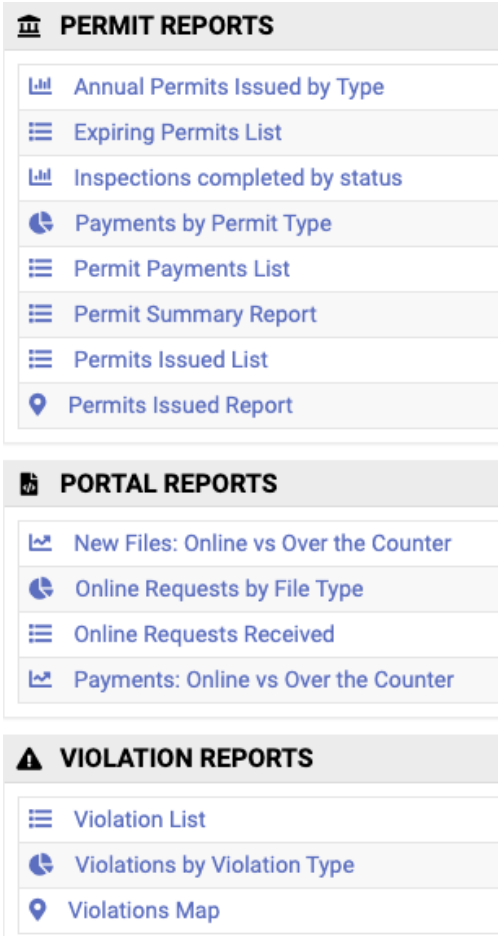


Citizenserve's Reporting Wizard Enables the Inclusion of Any Field, Mathematical Conditions, and Totals

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

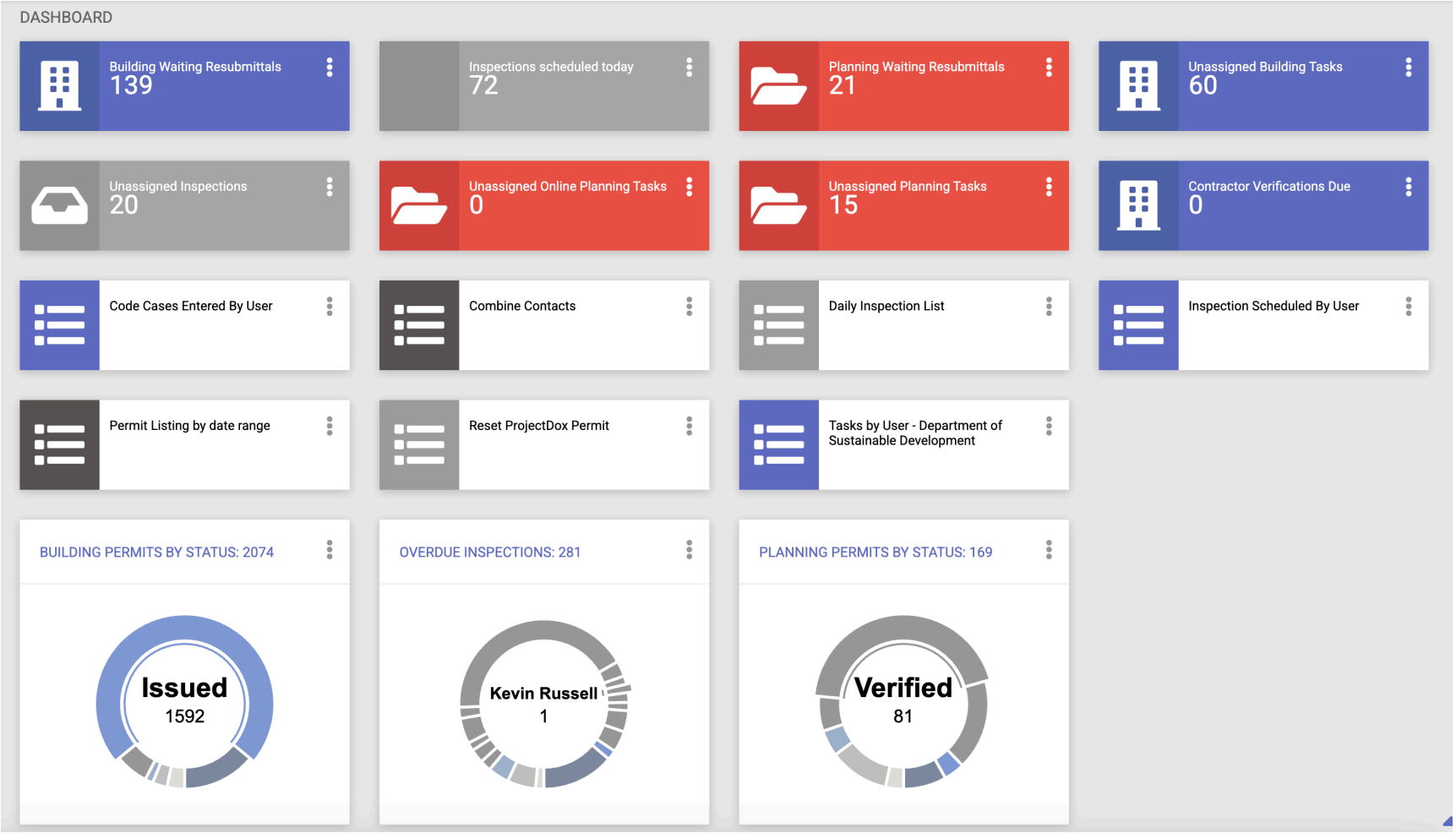


Citizenserve Standard Reports (page 1)



Citizenserve Standard Reports (page 2)

Dashboards & Analytics



Example citizenserve dashboard for a departmental manager

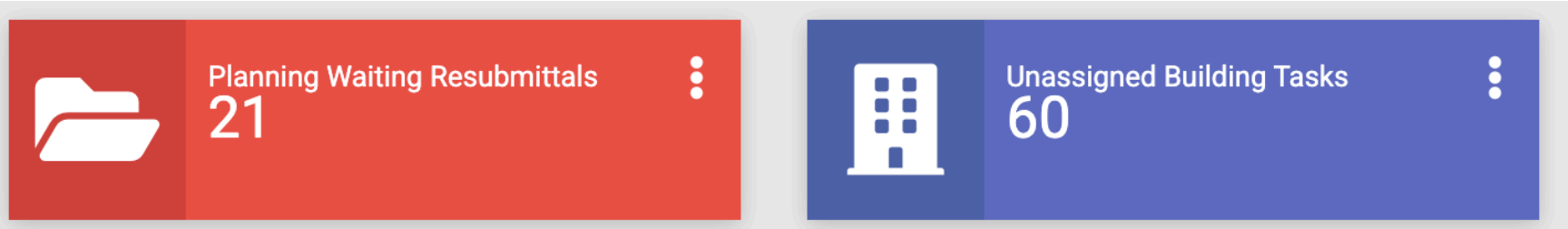
Citizenserve provides multiple dashboards to enable your users to quickly obtain the information and insights they need, such as a real-time display of overdue inspections or a comparison of plan review completion time by staff member. Dashboards are very easy

to configure and change by simply selecting the desired metrics from a list of available metrics, or Citizenserve will create any custom metric containing the data a user requests as part of our unlimited support. Data can span departments, subject to a user's permissions.

Four types of metrics are available: chart, report, single, and trend metrics. Examples of dashboard metrics include:

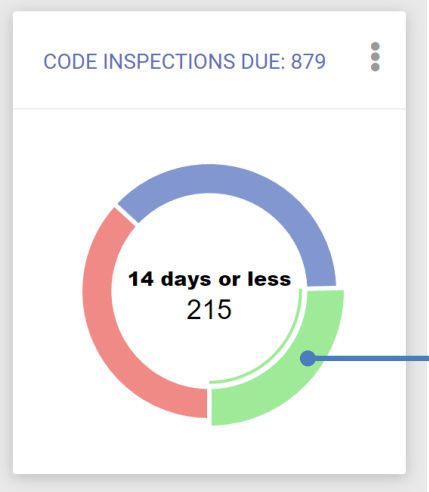
- Open permits by type,
- Assigned review tasks by staff member,
- Number of open code cases,
- Permit review turnaround times by staff member,
- Assigned inspections by inspector,
- Number of inspections completed by different inspectors by month,
- Online payments by month,
- Permit fees collected by permit type.

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



Example of two single item metrics from a departmental manager's dashboard; clicking on the metric opens the underlying files

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



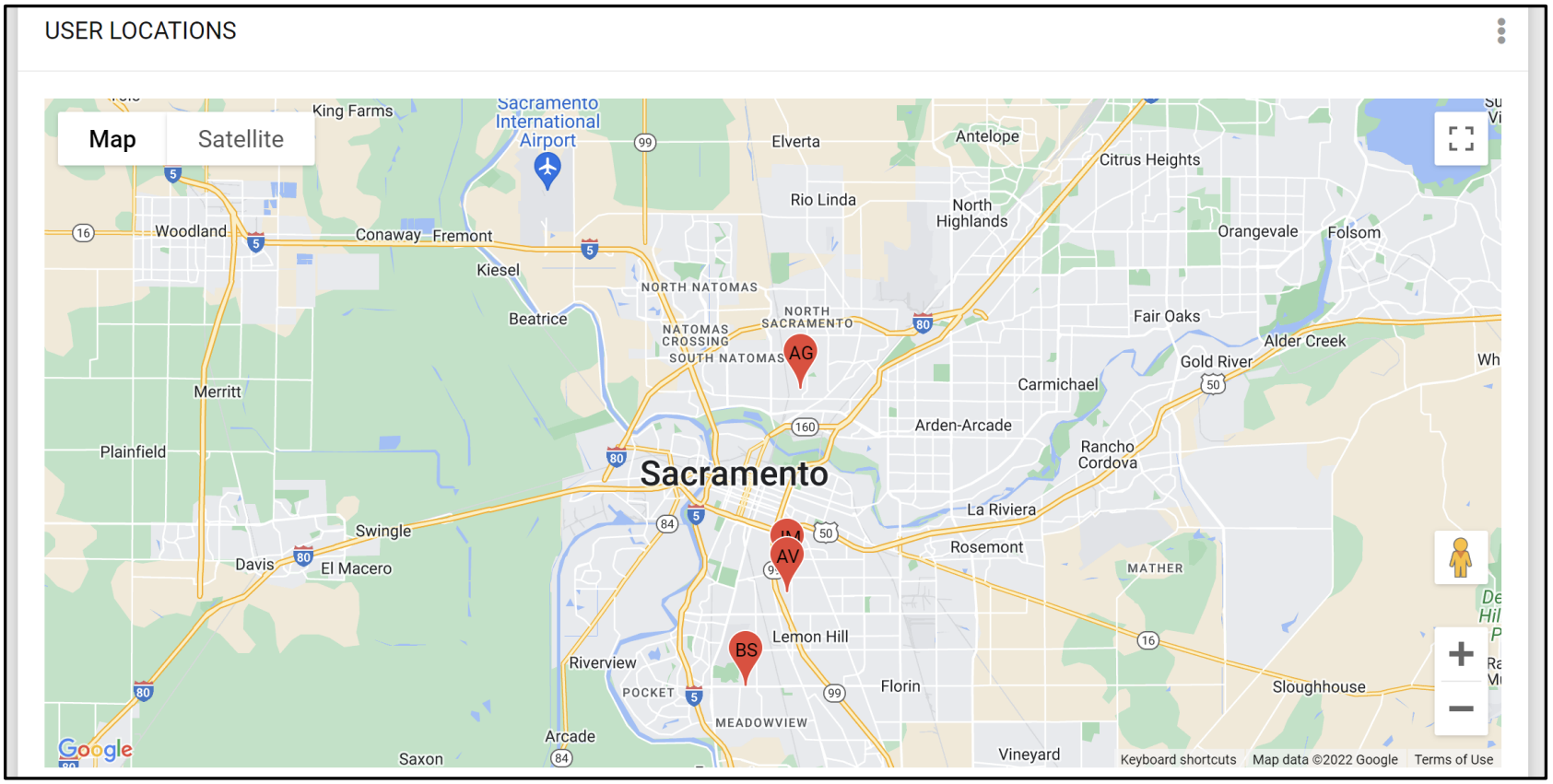
Hovering over a different colored segment of the chart displays specific information; in this case, the user is displaying the number of code inspections that are due in 14 days or less. Clicking on the segment opens the related list of code inspections.

Example Chart Metric

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

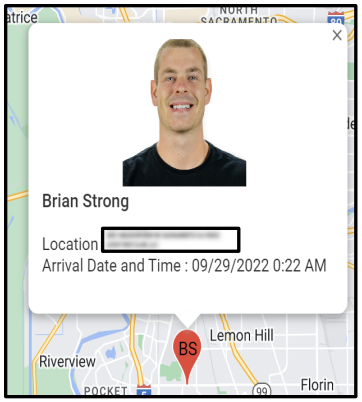


User Locations. With user locations you can see exactly where your inspectors are in the field at any time. This functionality can be turned off if preferred.



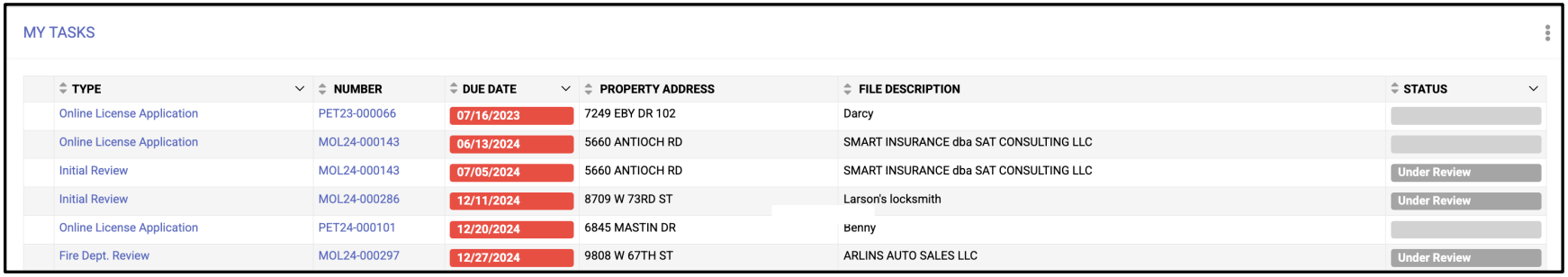
Example User Locations Map

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



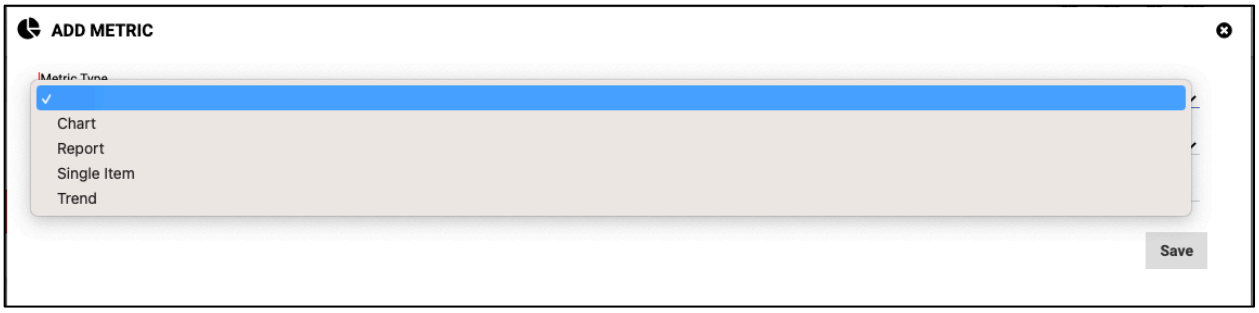
Example Inspector Drill Down

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



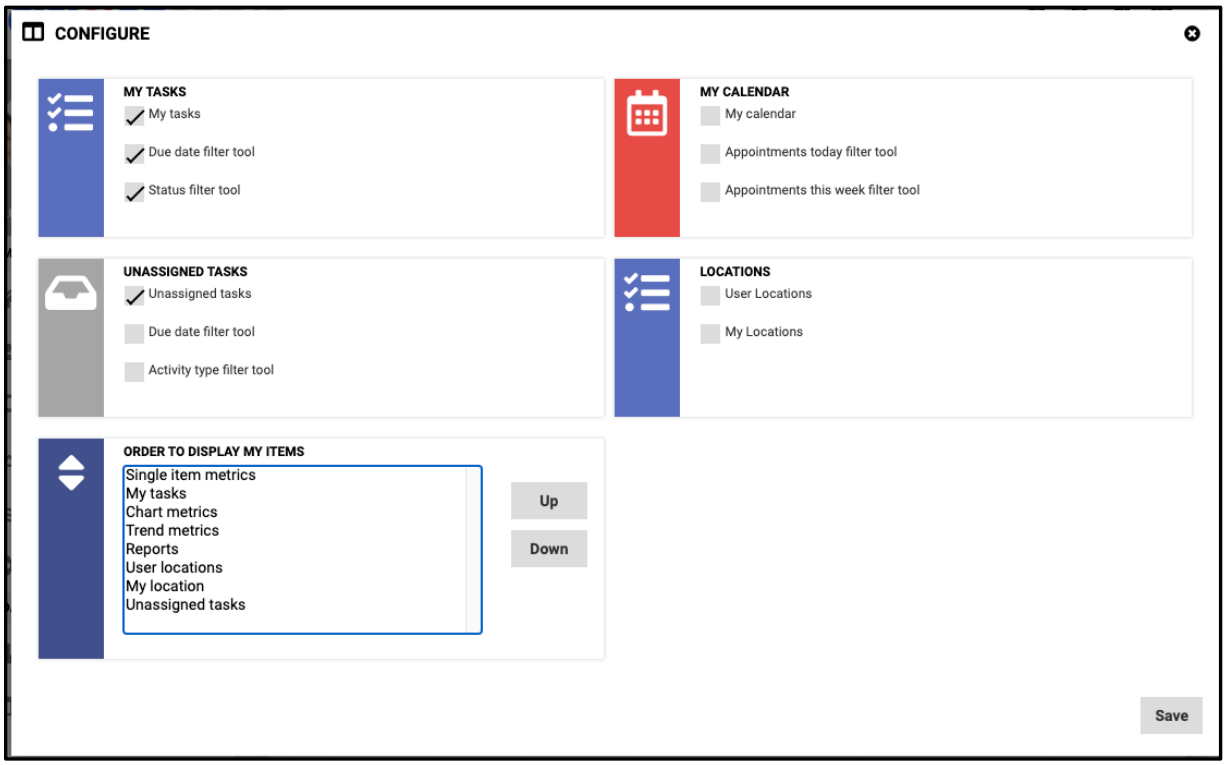
TYPE	NUMBER	DUE DATE	PROPERTY ADDRESS	FILE DESCRIPTION	STATUS
Online License Application	PET23-000066	07/16/2023	7249 EBY DR 102	Darcy	
Online License Application	MOL24-000143	06/13/2024	5660 ANTIOCH RD	SMART INSURANCE dba SAT CONSULTING LLC	
Initial Review	MOL24-000143	07/05/2024	5660 ANTIOCH RD	SMART INSURANCE dba SAT CONSULTING LLC	Under Review
Initial Review	MOL24-000286	12/11/2024	8709 W 73RD ST	Larson's locksmith	Under Review
Online License Application	PET24-000101	12/20/2024	6845 MASTIN DR	Benny	
Fire Dept. Review	MOL24-000297	12/27/2024	9808 W 67TH ST	ARLINS AUTO SALES LLC	Under Review

View Your Inspections or Tasks Due in a List View



Each User Can Add Metrics to Individual Dashboards

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



5.1.7 Mobile Field Computing

Citizenserve is fully functional in the field: there is no distinction between desktop or mobile device use, and your users do not need to install an app. Citizenserve uses a device and browser independent architecture. The full functionality of citizenserve can be used from any mobile device (iOS, Android, etc.) with a modern web browser, such as a table or mobile phone.

There is no software required on the local desktop or device, and no separate subscription to access citizenserve from the field. All citizenserve forms (staff side and portal) use a responsive design, which means the forms morph into the available form factor, automatically resizing to

fit the user's device. Citizenserve enables GPS location capture and voice-to-text data entry from devices that support these functions.

Activities that can occur from the field include:

Inspections. For inspections required for permits, licenses, and code enforcement, an inspector can receive an inspection request while in the field using a tablet, laptop, or other mobile device; complete the inspection while onsite; fill out the inspection form; and generate an inspection report for emailing from the field. Inspectors can look up property ownership information, add violations, take and attach photos, mark up photos, generate tickets or notices of violation, and schedule re-inspections – all in the field from a mobile device. Inspection documents can be generated in the field using an iPad or other mobile device and Bluetooth printer. Data entered in the field is immediately available to staff in the office, and vice versa.

We also have an offline inspection mode that enables inspectors to conduct inspections from the field when connectivity is unreliable. Data is automatically synched when connectivity is re-established.

Online Portal. Citizens, contractors, business owners, and other constituents can access the full functionality of the online portal from any mobile device. Constituents can submit applications, upload documents, check on status, securely pay fees, request inspections, and all other portal functionality from their mobile devices. Scanning a QR code on a notice, statement, or other Citizenserve document will automatically load the Town's citizenserve portal. Portal updates are immediately available to staff in the office, and comments, documents, and other entries by staff are immediately available to portal users.

Full Staff Use of Citizenserve. Today's mobile workforce means that staff are not always working from the office. The full functionality of citizenserve is available from any device, including any mobile device. Staff who are on-the-go can access and use citizenserve's full capabilities from iPads, Android devices, laptops, and mobile phones. All citizenserve forms use a responsive design, which means the forms morph into the available form factor, automatically resizing to fit the user's device. Data entered from a mobile device is immediately available to staff in the office, and vice versa – no synching required.

5.1.8 Document Management & Laserfiche Integration

The Town retains full ownership of its data, documents, and metadata.

We understand that the Town requires seamless integration to Laserfiche Cloud. We have already established integration to Laserfiche for other customers via the Laserfiche Cloud APIs. The Town will need to provide resources who are familiar with the Town's Laserfiche

folder/category structure, the metadata for each document type, and the triggers that will automatically send the documents to Laserfiche (e.g., changing a Permit Status to Issued sends the final building plans to Laserfiche). Documents are seamlessly accessed within the appropriate file/permit/license/code case via direct document links. The Town will need to ensure that network access to the documents is enabled.

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

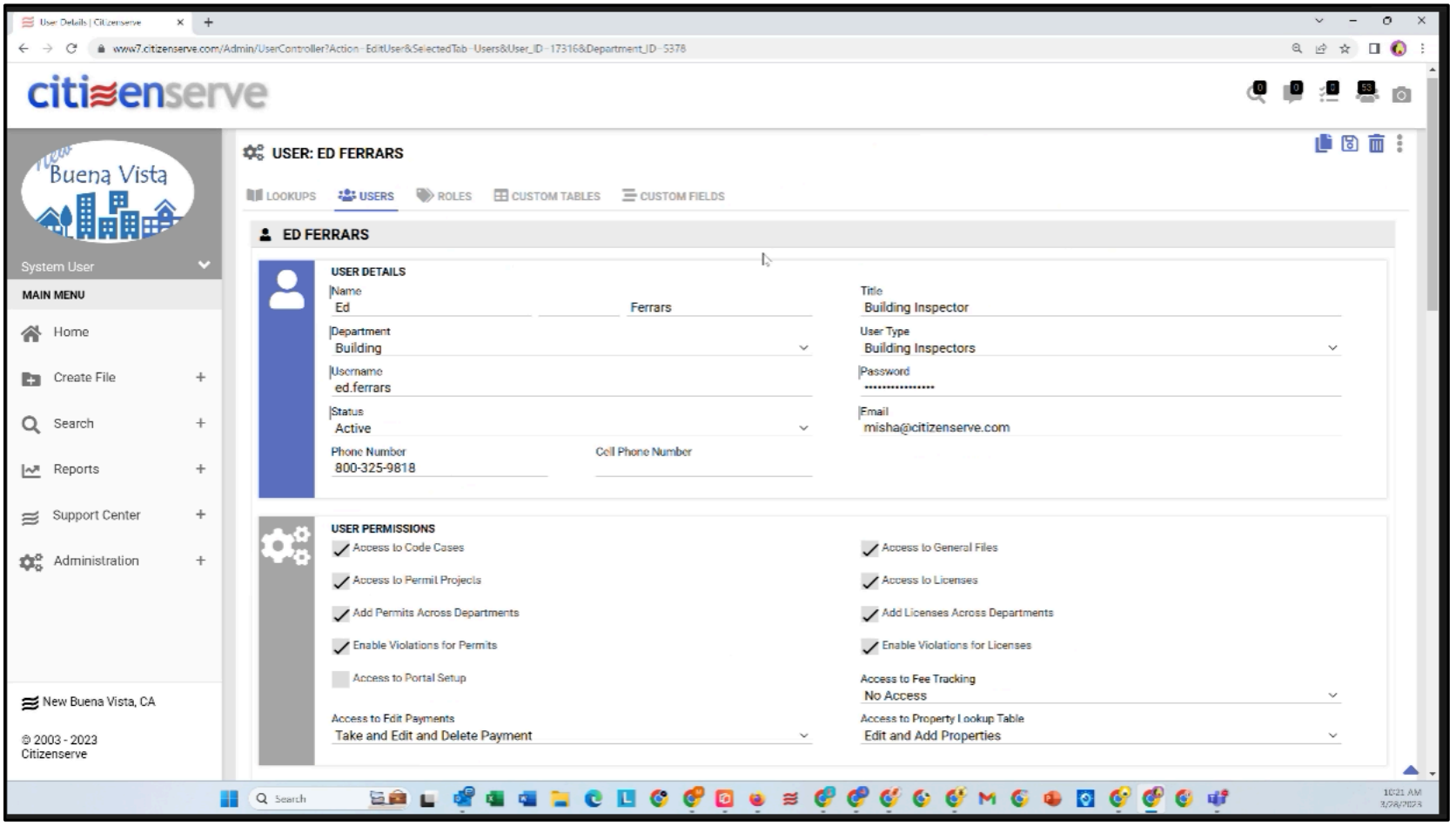
- Citizens, contractors, and businesses can submit required documentation such as site plans and insurance certificates through the citizenserve online portal, and the documents are automatically associated with the relevant case, project, property, contact, and/or application.
- Citizenserve accommodates the upload of all file types except for executables (for security reasons), including PDF and image files. Users can use drag-and-drop to quickly upload documents.
- Inspectors can attach documents from the field, including photos and videos, notices of violation, certificates of occupancy, or other documentation generated during an inspection.
- Staff can generate letters, emails, and other documentation that are automatically associated with the case, property, and application.
- As part of the plan review process, new versions of plans that contain markups are automatically associated with the relevant case, property, and application.
- Staff can upload and attach any additional documentation related to a case, property, and/or application. Users can use drag-and-drop to quickly upload documents.
- *Citizenserve subscriptions include unlimited storage.* You will never be restricted in the amount of storage used or charged for data and document storage.

Citizenserve will store your data and documents in perpetuity. We provide unlimited storage for the life of the subscription. For documents that have a deletion schedule, we can write procedures the Town can run to identify the documents in Preview mode prior to selection for deletion.

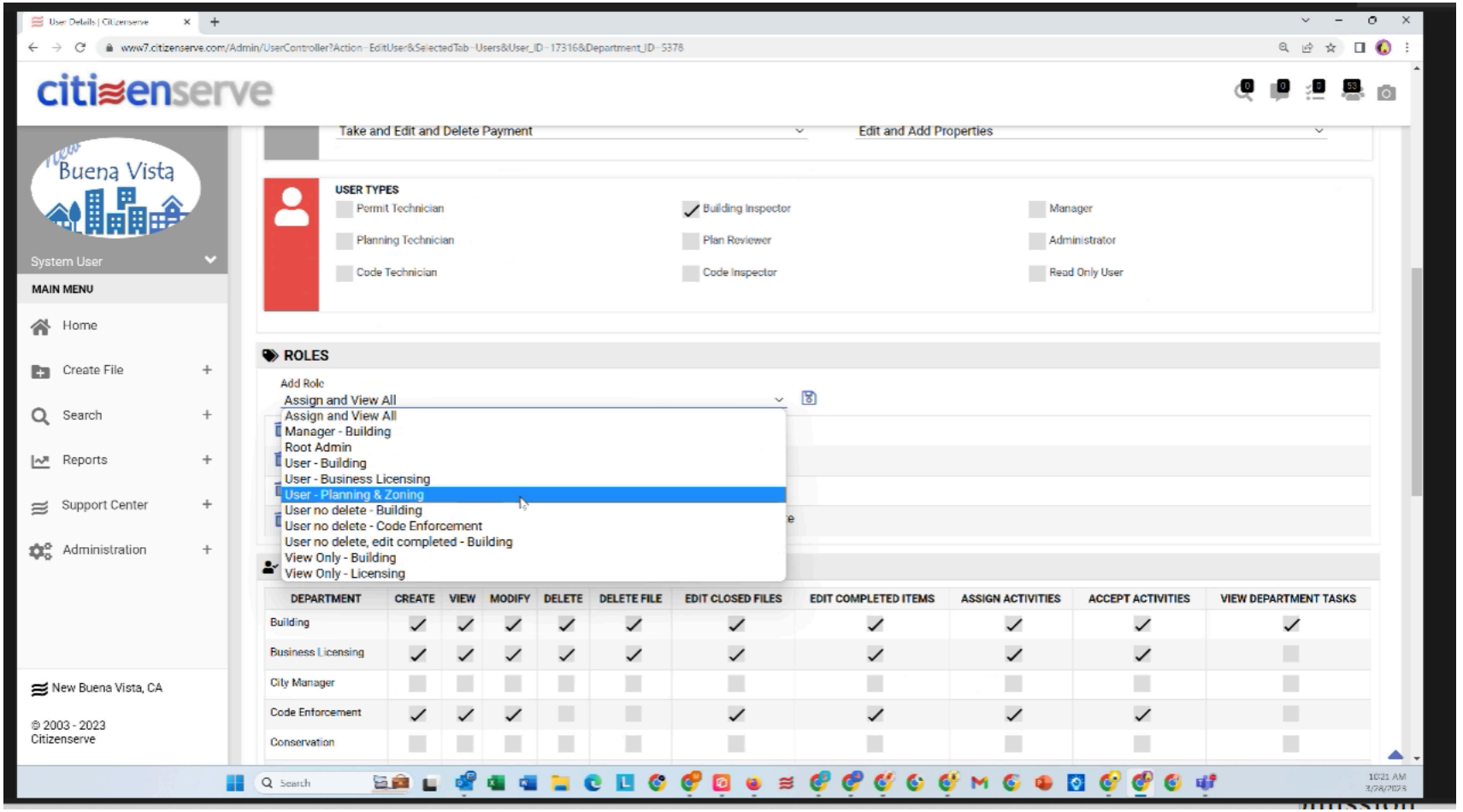
5.1.9 Citizenserve's Role-Based Security

Security in the system is role-based. All citizenserve file types, permit types, license types, activity types, and templates have a scope that can be shared for sub-departments or departments only. Departments set up roles such as manager, read-only, administrator, etc. Roles are added to users and the rights for each department and sub-department roll up into a security matrix for each user. Specific rights can also be controlled for access to different

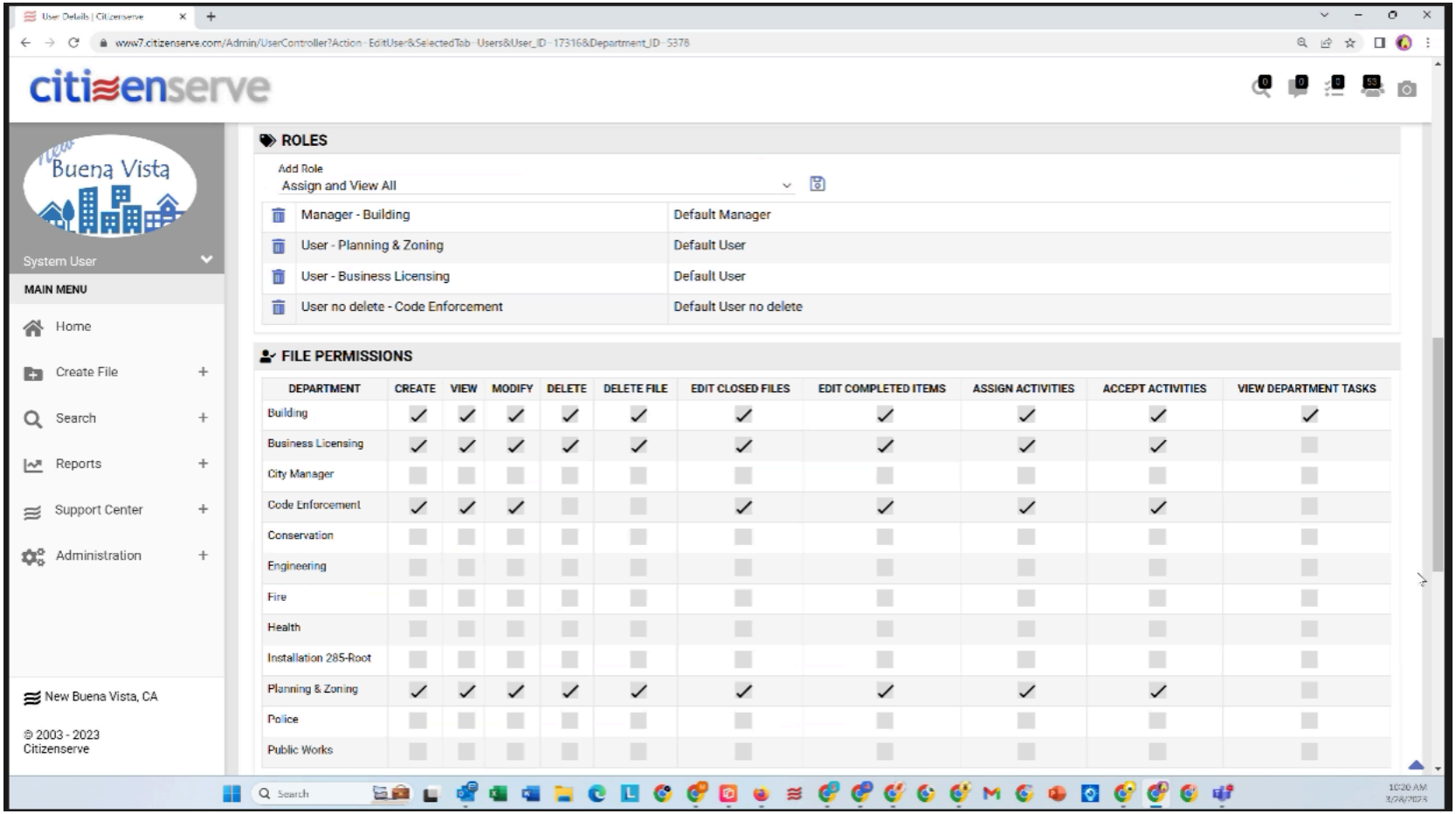
application features, such as Code Compliance or Permitting. The ability to access fee tracking and edit payments are also available, as well as the ability to edit and add properties. Each department/sub-department can set up roles that are assigned to users. Each department can have different roles and assign rights to create, view, modify, delete, delete file, edit closed files, edit completed items, assign activities, and accept activities.



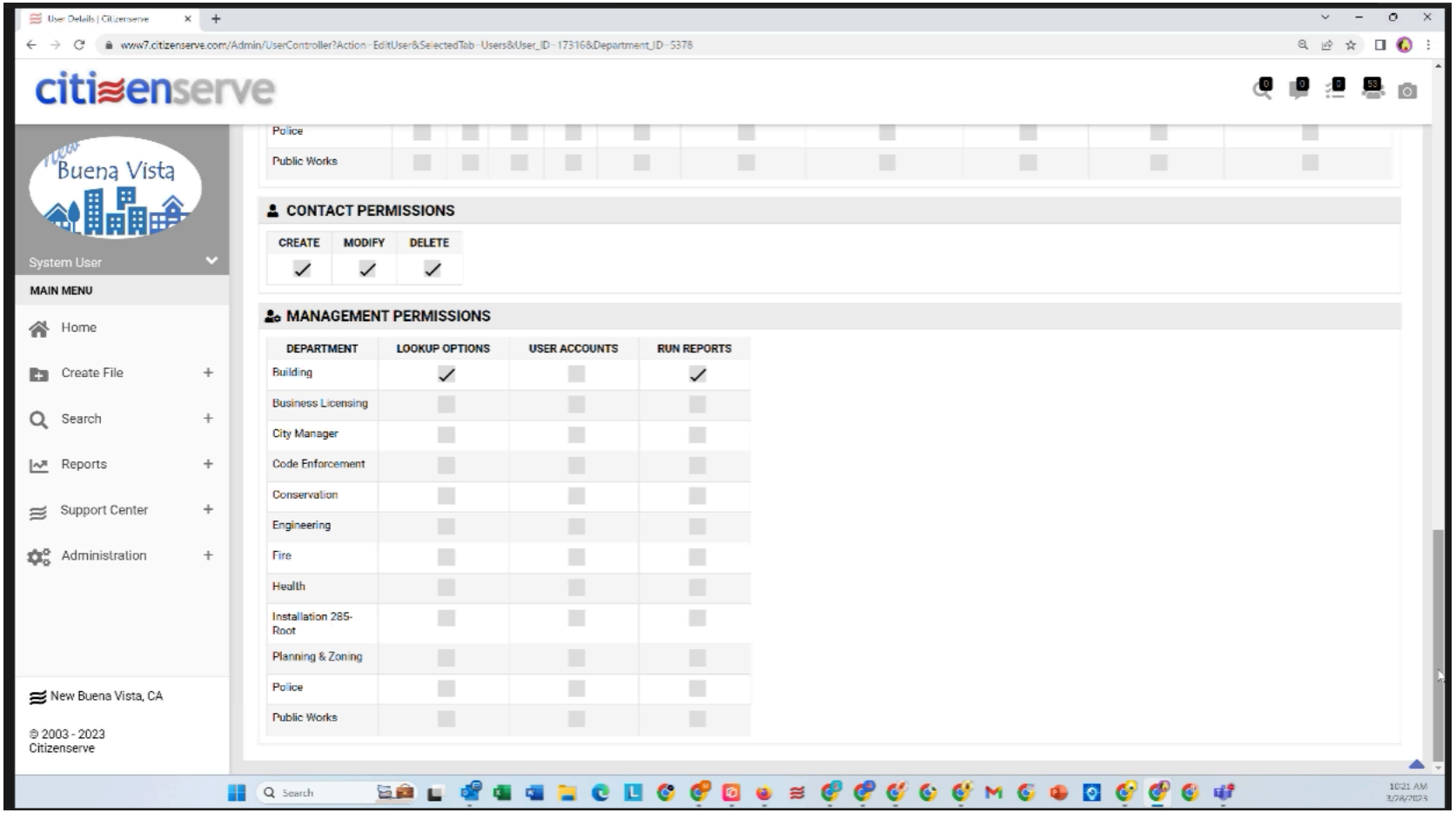
Citizenserve user permissions



A sample of Citizenserve role permissions available to this user/department



File Permissions provide an easy-to-read table of this user's rights across all departments



Display of this user's Contact Permissions and Management Permissions

5.2 Citizenserve Architecture Overview

5.2.1 Citizenserve Architecture

Citizenserve is only offered as a cloud-based Software-as-a-Service (SaaS) subscription. Citizenserve is device independent; it can be accessed from any desktop, laptop, tablet, phone, or other mobile device, including both iOS and Android devices. Citizenserve can be used on cellular and wireless networks from any location.

We developed citizenserve 22 years ago running on a Java application server with a middle tier of Enterprise Java Beans using a backend database of Microsoft SQL Server. This is the same technology we use today, although we incorporate much more JavaScript and HTML5 today as the current browser technology richly supports these features. Since we offer unlimited support to end users and technical staff, we are motivated to keep the application easy to use and focus on usability.

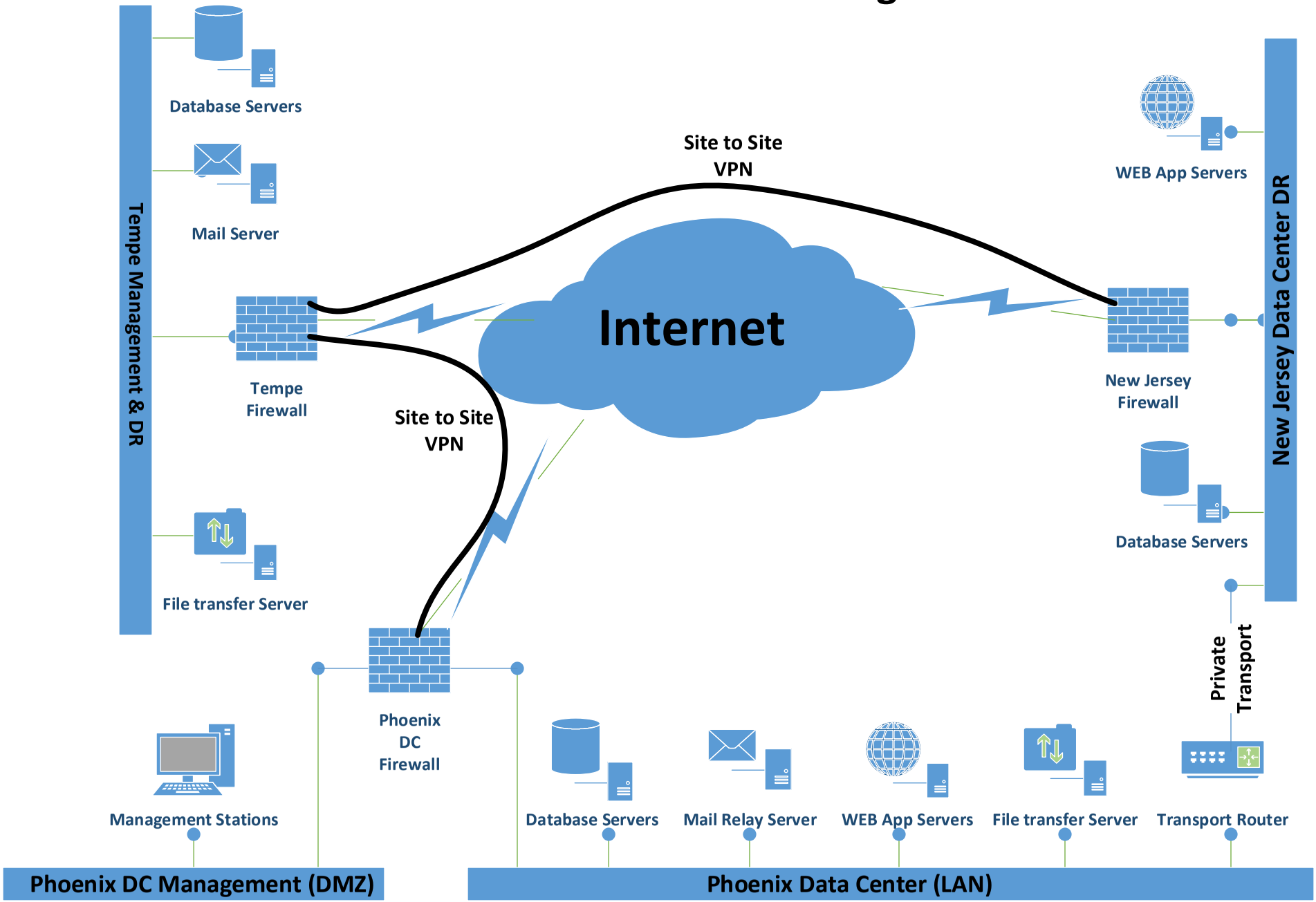
For our Artificial Intelligence (AI) tools, we use the model BERT, with custom data to finetune for different purposes. We have also used the Llama family for models for high end local LLMs. We have 22 years of extensive data that can be analyzed (after data anonymization) to inform our AI efforts, something on-premise companies cannot do.

As a cloud-hosted Software-as-a-Service, our customers do not need to procure or configure any server or other hardware other than devices with a modern web browser that will be used by users to access and use the system. Citizenserve staff maintain all hardware related to the system. Our hardware environment includes the following:

- Application servers run on Redhat Linux 7 and 8, Apache, and JBoss. They are hosted as Hyper-V VM devices on multiple physical hosts with replication.
- The Mail Relay server runs on the native Windows SMTP server. This server is used to send emails from the citizenserve web application; it does not receive emails.
- The file transfer server runs on Redhat Linux 7 and 8. The server is a secure FTP server and is used by customers to transmit large amounts of data.
- Our two AI servers are dedicated 8 GPU Lenovo 100 servers.
- Microsoft SQL Server databases are housed on servers running Windows. They are hosted and installed on physical hardware; multiple hosts exist with replicated copies of the production databases.

We have included a network diagram on the following page.

Citizenserve Architecture Diagram



5.2.2 Hosting Model

We house our customers' data in the Iron Mountain data centers. Our primary data center is in Phoenix, Arizona and our full backup data center is in Edison, New Jersey. Both data centers are Uptime Institute Tier III Design Certified and SSAE 16 SOC 2 Type II Certified and are audited annually by Schellman & Company, LLC.

Physical security is managed by the Iron Mountain Data Center. The data centers are gated and secure. Iron Mountain employees and partners do not have logical access to Citizenserve systems hosted within their data centers. All Iron Mountain employees and partners undergo thorough background checks. Access to the data centers is restricted through controlled card access systems. Data halls are secured with retina scan, key card, and PIN. Additional security includes mantraps and tailgate prevention. CCTV monitoring occurs 24/7/365, and security officers are onsite 24/7/365.

All Iron Mountain Data Centers have advanced fire suppression systems:

- Three-hour fire-resistant firewalls between each storage chamber.
- Roofs constructed with noncombustible steel and metal decking and protected with NFPA-compliant sprinklers.
- Roof support structures independently support each records storage chamber in the event of a fire or natural disaster.
- Integrated water backup supplies exceed fire hose and sprinkler standards of two hours.
- Fire detection and suppression systems are built according to guidelines set by the National Fire Protection Association.

The Citizenserve equipment in the Iron Mountain Data Center facilities is dual corded, receiving power from two separate feeds, including separate power supplies. The equipment itself has dedicated uninterruptable power supplies and staggered power to redundant power supplies.

Citizenserve runs with a single code base in a multitenant environment. An abstraction layer called "installation id" is used to separate and isolate customer data. Our access control is reviewed annually as part of our SOC 2 Type 2 and PCI DSS attestations. Access is continuously monitored. Our centralized infrastructure enables us to apply consistent, real-time security updates and patches. Each tenant's data remains private and secure.

We replicate all databases, application servers, and operations to the Edison, New Jersey data center. We operate under a business continuance approach; in a failover situation, all our support and test systems need to be available for us to continue operations. We also replicate locally in our primary Phoenix, Arizona data center. We have copies locally of all servers in the event of a server failure.

Incremental backups or logs are made every 15 minutes, and the logs are kept indefinitely so data can be restored to any point in time. Full backups are performed weekly and whenever a new version is released. Full backups are always test restored in read-only recovery mode to allow for logs to be restored if necessary to the backup copy. Database consistency checks are performed regularly with offline copies. At least one full copy is maintained per month for historical archiving. Combined with the logs, we have the ability to restore to any point in time.

System Recovery Time Objective (RTO) on production servers for minor failures such as a server failure is less than one hour. RTO on production servers for major failures such as a data center failure is four hours. System Recovery Point Objective (RPO) is 15 minutes on application servers and database servers.

If a server fails, we have a backup server. If the facility fails, we have a geographically diverse backup data center. If our data center provider fails, we have a standby facility capable of restoring operations in less than four hours. No other solution will provide more secure storage in the event a customer experiences a natural disaster or other emergency.

5.2.3 Uptime History

We have maintained 99.99% uptime since the company's inception. Planned downtimes happen at night and only require a 5-minute server restart.

5.2.4 Release Cadence

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

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

A Citizenserve subscription also includes major upgrades, which occur every few years – we are currently rolling out a major upgrade to our portal and will be rolling out our Automated Municipal Intelligence Engine (AMIE) by the end of the year. Major upgrades and the associated change management and training are offered with every subscription. With new major features, the customers who requested these features are in the vanguard of testing the feature in the test environment and in moving to the feature or upgrade.

5.3 Citizenserve Security

Citizenserve takes the safety of our customer's data seriously – we have never had a security breach. We engage in the following security controls and processes.

Physical Security

We house our customers' data in the Iron Mountain data centers; both data centers are Uptime Institute Tier III Design Certified and SSAE 16 SOC 2 Type II Certified and are audited annually by Schellman & Company, LLC.

Physical security is managed by the Iron Mountain Data Center. The data centers are gated and secure. Iron Mountain employees and partners do not have logical access to Citizenserve systems hosted within their data centers. All Iron Mountain employees and partners undergo thorough background checks. Access to the data centers is restricted through controlled card access systems. Data halls are secured with retina scan, key card, and PIN. Additional security includes mantraps and tailgate prevention. CCTV monitoring occurs 24/7/365, and security officers are onsite 24/7/365.

Data Encryption

Citizenserve encrypts data at rest on workstations and devices through browser security encryption using TLS. Client data is encrypted at the browser level using a GoDaddy encryption certificate; data cached in the browser is also encrypted. All data sent over the internet is encrypted using HTTPS. Citizenserve enforces masking of PII and/or financial related information through application security.

Secure Login

Users authenticate through a unique username and password. We have also included:

- Single Sign-on via integration to AUTH0, which integrates with Active Directory using the Town's federation service (Microsoft Entra ID).
- Multi-factor authentication via integration to AUTH0. We have configured Auth0 to use ADFS and Microsoft Authenticator.

Audit Capabilities

A log of failed login attempts is monitored and maintained. A log of successful logins is monitored and maintained with IP address, Operating System, and Browser version. Each file has a transaction/history log noting changes to the file and who performed the change, with date and time stamp.

Prevention of a DDoS

Citizenserve has never had an electronic or physical security breach. We use Malware Bytes to scan emails for emerging threats. Citizenserve uses two different companies for vulnerability scans: Halo Security and Tenable. Both are SOC 2 and FedRAMP certified. We have Windows and SQL Server alerting configured to notify the CIO/CISO and Director of Information Architecture of potential issues. Application logs are always available to enable usage analysis. We run penetration tests semi-annually as part of our annual PCI DSS and SOC 2 Type 2 credentialing.

We use the Sonic Wall Suite with Analytics firewall; alerting is configured to notify the CIO/CISO and Director of Information Architecture of any potential threats. Features include:

- Stateful packet filtering – rule-based port and device access to resources.
- GeoIP – Allows traffic filtering based on geographic location.
- Gateway Anti-Virus – Enforces virus scanning on all incoming data for HTTP, FTP, and SMTP.
- Intrusion Prevention – Protects against agent and script-based attacks.
- Anti-Spyware - Protects against specific trojan and adware-based attacks.
- Botnet filtering - Blocks connections to/from Botnet Command and Control Servers.
- Real time alerting – Monitors and alarms at critical conditions.
- Syslog and analysis – Provides long-term log recording and traffic analysis.

Employee Background Checks

We run background checks on every Citizenserve employee as part of the hiring process.

Employee Security Training

Every Citizenserve employee takes security training annually to ensure an ongoing focus on secure practices, the latest sources of vulnerability, and prevention of threats. Training includes:

- 2025 Common Threats,
- PCI DSS,
- Data Protection Essentials,
- Internet Security When You Work From Home,
- Phishing,
- Ransomware,
- Security Awareness, and
- Security Application Development: OWASP Top 10 (for technical staff).

SECTION 6 – IMPLEMENTATION APPROACH & SCHEDULE

6.1 Citizenserve Implementation Approach

We use an agile methodology that encourages exploration and adaptation to changing requirements. We do not manage by change order; we expect *and welcome* changes in requirements as our customers gain knowledge through the project, practice with the software, and consider best practices recommended by our implementation managers. While other vendors require scope changes for projects that exceed a set number of hours, reports, dashboards, data sets, custom fields, and training sessions, Citizenserve does not put a limit on these critical project elements, eliminating surprises and maintaining budget transparency. Your project will go live when you are satisfied with the configuration and functionality and your users are fully trained and comfortable with the transition.

We recognize that our implementation approach does not align perfectly with the implementation plan described in the Town's RFP. We have successfully used our agile approach for the 22 years the company has been in business, with excellent results and satisfied customers. We emphasize delivering what the customer wants and needs rather than limiting scope and issuing change requests. We invite you to contact any of our customers to ask about their experiences with our agile implementation approach.

Our approach involves the following steps:

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

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

Initial Setup. The Citizenserve implementation manager works from the information on the Setup Checklist to configure the system; typically, the initial setup comprises 50% of the entire setup.

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

Data Migration. We perform data migration by module/function. Once the setup for a module/function is nearly complete, the Citizenserve data migration lead will write and test the scripts to migrate the legacy data; this process cannot take place until all custom fields for the module/function that are related to the legacy system have been identified and configured in citizenserve. Town staff will perform data migration testing to ensure that the legacy data is being copied to the correct fields. The Citizenserve data migration lead will continue to revise the data migration scripts prior to go live until the Town signs off on data migration testing.

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

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

Each training session will focus on that group's core job responsibilities. Most users and system administrators attend one or two training sessions that last up to 2.5 hours; additional one-on-one training sessions can be scheduled for users who would benefit from additional training. Unlimited live online training is included post go live as part of Citizenserve's unlimited support.

We create each training class custom to accommodate a customer's specific business processes and configurations. Training includes various training scenarios and exploration of different

workflows. We provide comprehensive training on the full functionality of the system. Training documentation will be specific to the Town and to each group's job responsibilities.

Go Live. Final data is typically provided on a Friday afternoon. Over the weekend all test data is removed from the system and the legacy data is migrated. The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial; the Town decides when they are comfortable with the system and no longer require the weekly walkthrough meetings.

Ongoing Support and Maintenance. Users can request support for any needs or questions through the Citizenserve Support Center that is integrated into the software. Ongoing support is provided by Citizenserve employees located in the United States. Response time to a standard support request is within one (1) hour (average is 17 minutes); urgent requests receive a response within 15 minutes (average is 6 minutes). Our support staff members are available to resolve issues, develop custom reports, make edits to certificate templates, help you utilize existing and new features, modify your setup for process changes, and provide unlimited user training. Over 84% of requests are resolved and closed within one business day.

6.2 Citizenserve Implementation Plan

We have provided a high-level project task list below that covers the full scope of work of the project, broken out by phase.

Information Gathering Phase

Deliverables

- Setup Checklist of required documentation from the Town (Owner: Citizenserve implementation manager)
- Process Document describing all processes to be managed by Citizenserve (Owner: Town project manager)
- List of All Forms, Notices, and Standard Letters (Owner: Town project manager)
- Examples of All Forms, Notices, and Standard Letters (Owner: Town project manager)
- Workflow Document describing all workflow routes (Owner: Town project manager)
- Process/Policy Gap Document identifying gaps in current processes & policies (Owner: Town project manager)
- List of Users and Security Rights (Owner: Town project manager)
- Data Sources to be migrated (UNMODIFIED) (Owner: Town project manager)

Milestones

- Setup Checklist Complete
- Process Document Complete
- List and Examples of All Forms, Notices, and Standard Letters Complete
- Workflow Document Complete
- Process/Policy Gap Document Complete
- List of Users and Security Rights Complete
- Data sources to be migrated provided to Citizenserve implementation manager

System Setup and Configuration Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve project manager)
- Basic Installation (Owner: Citizenserve implementation manager)
- Configured Forms, Notices, Letters, etc. (Owner: Citizenserve implementation manager)
- Configured User Accounts and Rights (Owner: Citizenserve implementation manager)
- Configured Citizenserve System in Test Environment (Owner: Citizenserve implementation manager)
- Citizenserve Integration Programs (Owner: Citizenserve solution architect)
- Data Migration Programs (Owner: Citizenserve data migration lead)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- Basic Installation Complete
- Configuration of Forms, Notices, Letters Complete
- Configuration of User Accounts and Rights Complete
- Geocode Property Data Imported and Approved
- GIS Layers Used in Mapping and Reporting Imported and Approved
- Payment Gateway for Applications Paid in Online Portal Complete
- Configuration of Citizenserve System in Test Environment Complete
- Data Migration Programs Tested and Complete
- Integration Programs Tested and Complete

System Readiness Phase

Deliverables

- User Acceptance Testing (Owner: Citizenserve project manager, Town project manager)
- Updated Citizenserve Configuration (Owner: Citizenserve implementation manager)

Milestones

- User Acceptance Testing Complete
- Citizenserve Configuration Approved

Training Phase

Deliverables

- Training Documents for Town's Users (Owner: Citizenserve implementation manager)
- Training Courses for Town's Users (Owner: Citizenserve implementation manager)
- Training Documents for Town's System Administrators (Owner: Citizenserve implementation manager)
- Training Courses for Town's System Administrators (Owner: Citizenserve implementation manager)

Milestones

- User Training Documents Approved
- System Administrator Training Documents Approved
- Town's Users Fully Trained on Citizenserve Use
- Town's System Administrators Fully Trained on Citizenserve Use

Implementation Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve project manager)
- Fully Configured Production Instance of Citizenserve (Owner: Citizenserve implementation manager)
- Fully Migrated Legacy Data (Owner: Citizenserve data migration lead)
- Integration Points Configured in Production (Owner: Citizenserve solution architect)
- Supplemental Training Courses for Users, System Administrators (Owner: Citizenserve implementation manager)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- Citizenserve Production Instance Approved
- Migrated Legacy Data Approved
- Citizenserve Integration Points Approved
- Users, System Administrators Fully Trained on Citizenserve

Go-Live Phase

Deliverables

- Fully Configured Production Instance (Owner: Citizenserve implementation manager)
- Loaded Data in Citizenserve Production Instance (Owner: Citizenserve implementation manager, Citizenserve data migration lead)

Milestones

- Citizenserve Production Instance and Migrated Data Approved
- Citizenserve Goes Live

Post Go-Live Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve project manager)
- Updated Citizenserve Configuration (Owner: Citizenserve implementation manager)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- No Further Changes to Citizenserve Configuration Identified

Unlimited Support Phase

Deliverables

- Biweekly Updates and Enhancements (Owner: Citizenserve Development Team)
- Release Notes (Owner: Citizenserve Development, Implementation, & Support Director)
- Major Upgrades (Owner: Citizenserve Development Team)
- Change Management Support for Major Upgrades (Owner: Citizenserve Support Team)
- Unlimited Customer Support (Owner: Citizenserve Support Team)

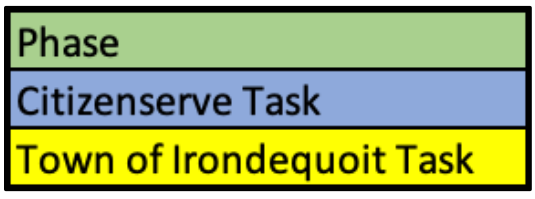
Milestones

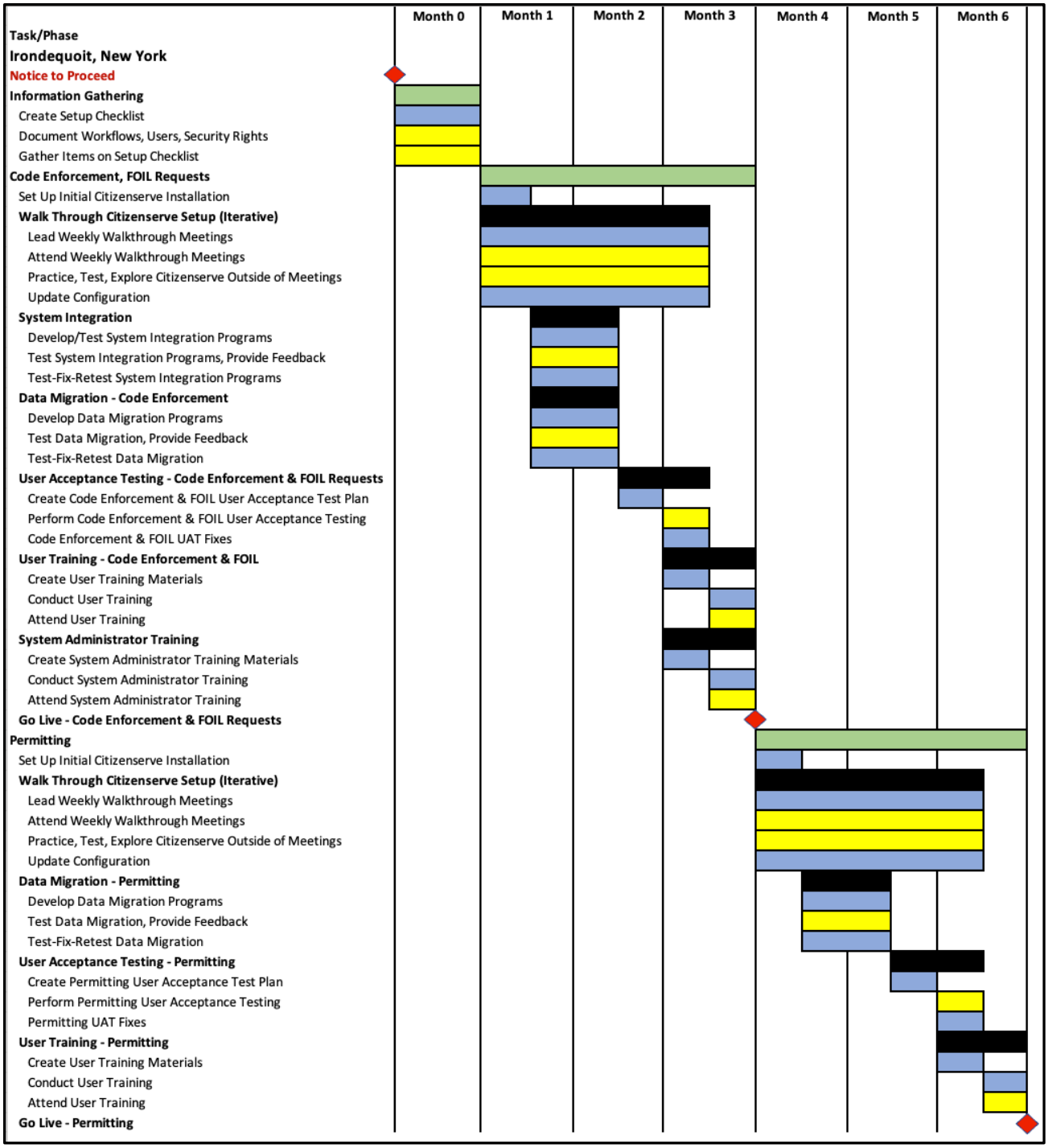
- Release Notes Delivered
- Biweekly Updates and Enhancements Delivered
- Major Upgrades Delivered
- Major Upgrade Change Management Support Delivered
- Support Tickets Resolved and Closed

6.3 Draft Project Schedule

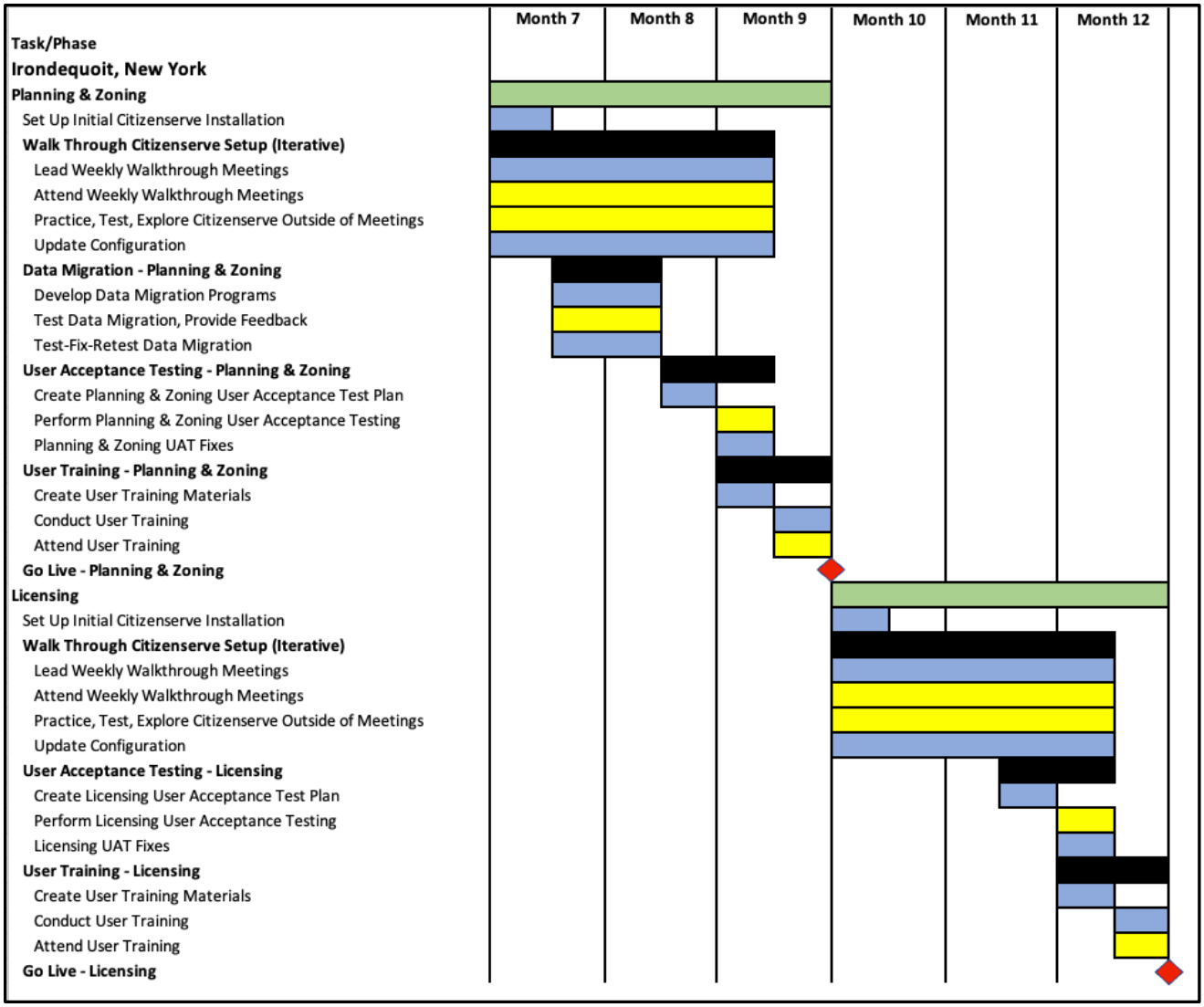
We have included a draft project schedule below. We made the following assumptions when developing the project schedule:

- We assume that the Town team will collect the required information on the setup checklist provided by Citizenserve prior to the beginning of the project, including copies of permit and license applications, fee schedules, letters and notifications, etc. The timely start of the project depends upon the collection of this information.
- We assume that knowledgeable subject matter experts from each area will be available for the weekly walkthrough meetings as scheduled.
- We assume that Town team members will complete their assignments in the days between the weekly walkthrough meetings.
- We are assuming the Town would like training to enable their own system administrators to perform system administration tasks. We have therefore included this training in the schedule in Phase 1. If the Town would rather have Citizenserve provide all system administration, this is included in our unlimited support at no additional charge.
- We assume the Town will ensure the attendance of all users and system administrators in training classes.
- We have labeled the schedule “draft” because it requires the Town’s input.





Draft Citizenserve Project Schedule for Irondequoit, New York (Phases 1 and 2)



Draft Citizenserve Project Schedule for Irondequoit, New York (Phases 3 and 4)

SECTION 7 – DATA MIGRATION PLAN

We migrate data for each module at separate points in the project to align with the phased implementation of departments/functions. We have included pricing to migrate the Town's Edmunds GovTech data; based upon the description in the RFP, we are assuming that only permitting and code enforcement data and documents will be migrated.

We will ask the Town to provide the GovTech databases that are to be migrated in an unmodified state. The Town's team will be responsible for selecting test cases in the GovTech system and providing screen shots from each of the GovTech screens; our data migration lead will use these screen shots to map the citizenserve fields to the GovTech fields. Our data migration lead will work with the Town to map the fields from the GovTech databases to the corresponding fields in citizenserve.

We do walkthroughs with key users to make sure files are getting set up properly. The Town team will review the migrated data by selecting test cases and comparing the data in the GovTech system to the data in citizenserve, identifying any errors or omissions. The Citizenserve project manager will document and track any errors or omissions identified during testing and the Citizenserve data migration lead will make changes to the migration scripts as needed. If the data migration import is modified and rerun, the Town team will be responsible for reviewing the migrated data to ensure the accuracy of the imported data.

A data migration environment is available for test runs of the data migrations, where we will load the Town's citizenserve configuration and setup. We can run the migration scripts as many times as necessary to identify and resolve any scripting errors; this process requires time from Town staff to review the migrated data prior to go live.

While we do not limit the number of test runs of the data migration scripts during implementation, it is important to recognize that it is very challenging to make changes to the migrated data once the system has gone live. We emphasize the thorough testing of the data migrations **during** the project implementation to ensure we have identified any needed corrections **prior to go live**.

One common issue with data migration is obtaining the legacy data from the legacy vendor. We recommend the Town begin these discussions with your Edmunds account representative now to ensure the data is available when required. The Town will need to provide one copy of the legacy data at the beginning of the project to enable Citizenserve's data migration lead to map the GovTech data fields to the corresponding citizenserve fields; we will also require a copy of the GovTech data right before go live. The Town will need to set a cutoff time for using the

legacy system prior to go live weekend to ensure all data that needs to be migrated is accounted for.

SECTION 8 – SYSTEMS INTEGRATION

Most of our customers require integration to one or more external systems, and we are very experienced in creating custom integrations for a wide variety of integration points. Our experience includes developing custom REST webservices for integration with external systems, creating payment gateways to accept customer credit card payments online, creating daily closeout export files for input into financial systems, integrating with GIS and property appraisal systems for parcel and other data imports, exporting calendar invites to Microsoft Outlook, sending emails from the system, and many more integration points with external systems. We can provide JSON endpoints to share citizenserve data with external systems and have endpoints available to create/update Files, Property, Permit, Activity/Inspection, Fees, and Contact data you can utilize to push data to citizenserve.

The requirements for the configuration of each integration will be gathered during the weekly walkthroughs; the typical integration is accomplished via REST webservices. The Citizenserve solution architect will develop the scripts for each integration point to send data to target systems and receive data from providing systems, including any data conversions required. The Town's team will test the data exchanged between citizenserve and the external systems and will provide feedback on needed changes. We will continue making edits to the integration scripts and testing until the Town signs off on each integration.

We will integrate to the following external systems as part of the Town's project:

ESRI GIS. This is the most common integration we perform. Integration to receive GIS data will be accomplished via REST webservices. We will import an unlimited number of attributes and layers and can accommodate an unlimited number of spatial joins. We can create GeoJSON endpoints to output data for consumption by the Town's GIS.

TBD Payment Processor. If the Town selects a payment processor and version for which we have already established integration, there will be no charge for this integration; see the following list. If the Town selects a payment processor that is not on the list, the Town will incur a one-time charge of $15,000 for the integration.

- ACI Universal Official Payments
- BIQ SHO
- CityHall Payment
- Convergys
- EGov Payment
- Authorize.Net v2
- Bluefin PayConex
- Civitek Paynow V2
- CyberSource 4.0
- ETS

- Forte
- Government Windows
- Invoicecloud
- Kubra EZ-Pay
- OpenEdge HostPay
- Payeezy
- Pay Connect
- Paypal
- Point and Pay
- PSN
- Unipay
- Xpress Bill Pay 3.0
- GovPayNet
- Heartland Bolletta Pay
- JetPay Magic
- MuniciPay
- Paybill
- PayExpressPay
- Paymentus Payment
- Payflow Pro
- PlugnPay
- SCGovPEGV3
- VPS

Laserfiche. We have already established integration to Laserfiche for other customers via the Laserfiche Cloud APIs. The Town will need to provide resources who are familiar with the Town's Laserfiche folder/category structure, the metadata for each document type, and the triggers that will send the documents to Laserfiche (e.g., changing a Permit Status to Issued sends the final building plans to Laserfiche).

Single Sign-On. We can integrate to the Town's Active Directory via uth0 to enable Single Sign-on. Auth0 integrates with Active Directory using the Town's federation service (Microsoft Entra ID).

Multi-factor Authentication. We can enable multi-factor authentication using Auth0. We have configured Auth0 to use ADFS and Microsoft Authenticator.

Tyler Munis. We have been in communication with Tyler in the last month and have confirmed that they do not have APIs available for integration with Munis. We will instead provide one or more nightly CSV exports of financial information, formatted to the requirements of Tyler Munis. Examples of files include:

- CSV files of payment summary transactions and
- CSV files of refund transactions.

Files will be sent to a secure FTP site for upload into Tyler Munis. Citizenserve will set up the Town's fees and map them to the Town's GL codes during implementation, and maintenance of the Town's fees (changes to current fees and the addition of new fees) is included as part of the subscription's unlimited support.

SECTION 9 – TRAINING & CHANGE MANAGEMENT PLAN

Training Approach

We will create a training environment that contains your configuration and data; your users and system administrators will therefore be training using an environment in which they are familiar. This training environment will be available in the pre go live training sessions and can be made available for additional post go live training, as necessary.

Online training for all users and system administrators is included as part of the implementation costs, and Citizenserve's unlimited support includes unlimited online training post go live. Our traditional approach to training is to conduct instructor-led training via web conferencing in small groups, and the vast majority of our customers employ this method of training. We provide unlimited web conferencing training for both users and system administrators. With web conferencing we can transfer screen control to the users so they obtain experience using the system during training. Any of the web conferences used for training can be recorded and edited for later viewing.

User Training

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

Most users attend one or two training sessions; additional one-on-one training sessions can be scheduled for read/write users who would benefit from additional training. The typical training class lasts up to 2.5 hours.

System Administrator Training

Administrative support is included in the subscription, and we can either provide training to administrators or provide direct administrative support throughout the life of the subscription. We have customers who are using both means of support to achieve successful administration of Citizenserve.

If the Town will have staff performing system administration tasks, we will provide instructor-led online training that focuses on the tools used to configure the system (staff and portal side); navigate the system; create and maintain user roles; write reports; set conditions; and develop letters, emails, certificates, and other system outputs. Unlimited system administrator training is included with the subscription, so anytime the Town's system administrators have questions they can submit a support ticket for timely assistance.

Training Videos

Any of the web conferences used for training can be recorded and edited for later viewing. We also have a robust library of training videos available from our website and frequently publish new content.

Change Management Approach

Key stakeholders in each department will have to manage change requests from their user community to ensure that there is agreement from the Town on proposed changes; our goal is not to restrict the number of changes the Town requests, but to ensure that the Town is proposing changes that have been thoroughly considered and approved. It is easy to make changes in Citizenserve, and the Town will be able to quickly see and try out changes. We need to make sure the change has been vetted and approved by the responsible parties to ensure the project progresses according to the Town's schedule.

All our implementation staff are veterans with years of experience with Citizenserve and community development. Our staff have deep knowledge of community development processes, common points of inefficiency, and ways to improve upon broken processes. The weekly walkthrough sessions provide the opportunity for the Citizenserve implementation manager to make suggestions for improvements and for the staff to try out these changes. If a change is not popular or does not work, it is quick and easy to back it out and revert to a prior configuration. All changes made during the project are documented in the weekly walkthrough meeting minutes.

The only changes that trigger a change request form are:

- New system integrations,
- New sources of data migration, and
- Customizations to the base code of the software (rare, as citizenserve is a highly configurable software solution).

Updates and enhancements are included in the subscription. After going live, requests for new features and functionality are tracked in the Support Center that is built into citizenserve. Users can subscribe to the updates and get a list of all the changes and fixes in the most recent version before it is released. With new major features and major upgrades, the customers who

requested these features are in the vanguard of testing the feature in the test environment and in moving to the feature or upgrade, providing us with useful feedback early on so we can refine the features and fix issues without affecting other customers, all while still on one software code base.

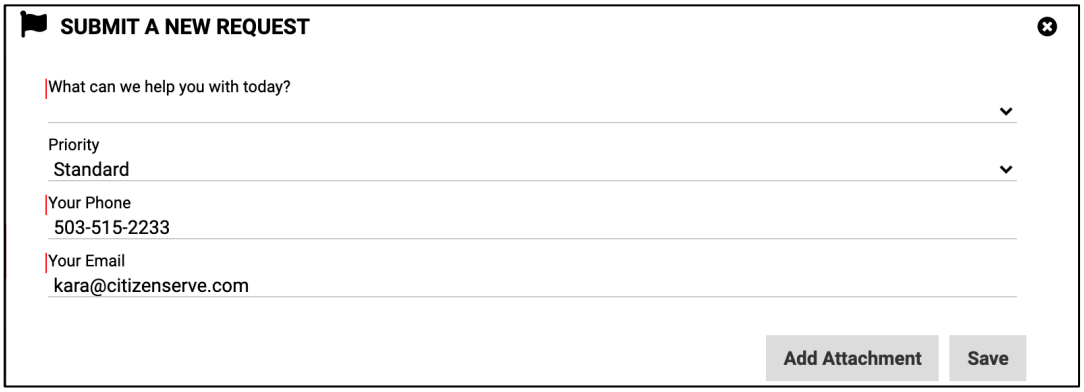
SECTION 10 – CITIZENSERVE UNLIMITED SUPPORT AND MAINTENANCE

Unlimited Support and Maintenance

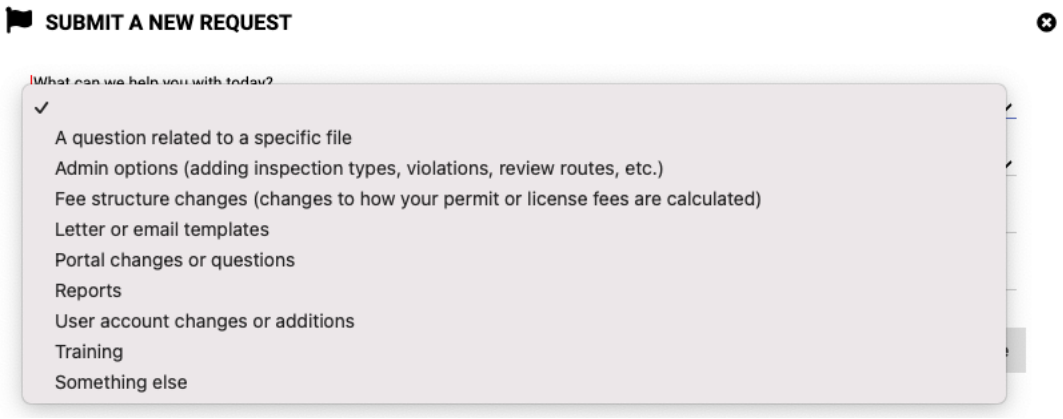
Citizenserve offers unlimited support, maintenance, and training for the life of the subscription. The support extends to addressing any issues, adding new permits and licenses, setting up new workflows, changes in building and zoning codes, changes in fee schedules, writing custom reports, and user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

Support Desk Processes

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

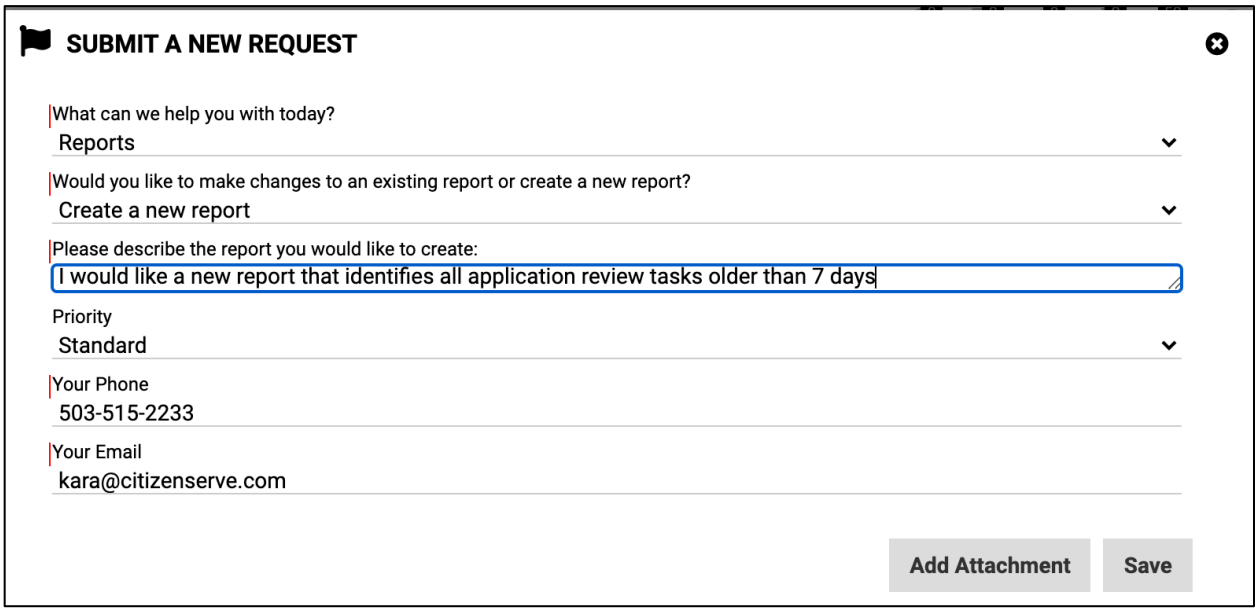


Support Center Request Submission Form (View 1)



Support Center Request Submission Form (View 2)

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



Support Center Request Submission Form (View 3)

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

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

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

We gather metrics on all our support staff and on the collective performance of the Support team. When a Citizenserve employee logs into the Support Center, they are presented with metrics for their performance and the performance of the team; we provide high visibility of this data to reflect the importance we as a company place on providing timely and accurate support to our customers. Metrics are analyzed weekly by the Director of Implementation and Support and coaching is provided when targets are missed. We gather the following Support metrics for both individual team members and the team:

- Response time to Support requests,
- Number of open requests:
    - Still within target close period,
    - Open for longer than the target close period but less than a week, and
    - Open for longer than a week.
- Same-day close percentage, and
- Number of Thumbs Up and Thumbs Down reviews provided by customers when their Support ticket is closed.

Maintenance

Citizenserve also provides full system maintenance with every subscription. Citizenserve staff install and maintain the software, optimize the database, patch the servers, handle system security, and monitor performance as part of the subscription.

As a hosted solution, Citizenserve staff monitor the performance of the system. The application servers and database are monitored continuously with alerting to ensure the continued optimal performance of the system. Processor utilization, pages, memory utilization, and replication are all monitored. Expensive queries are easily identified and can be optimized on a continual basis.

Hours of Availability

Support requests can be marked as standard or urgent. Where other vendors set the priority of support requests or rely on an algorithm to do so, Citizenserve empowers our users to identify the problem priority as standard or urgent.

- For standard requests, support staff are available from 8:00 a.m. Eastern Time through 8:00 p.m. Eastern Time during non-holiday business days (Monday – Friday). Response is within one business hour; average response time of 17 minutes.
- For urgent system requests, Citizenserve staff are available 24/7/365. Response is within 15 minutes; average response time of 6 minutes.

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

SECTION 11 – COST PROPOSAL

We provide fixed price, not-to-exceed bids for all our projects. We have provided a description of each of the cost elements of the Town's project below.

11.1 Annual Subscription Fees

Citizenserve is only offered as an annual subscription. Subscription pricing is tiered based on number of users – we do not provide unlimited subscriptions. A Citizenserve subscription includes all the Citizenserve modules:

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

The Citizenserve subscription includes:

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

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

A few additional clarifications on the annual subscription pricing:

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

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

We estimated the total number of Town users at 15. The annual subscription cost per user for 15 users is $2,100. If the Town requires a different number of users, the above subscription pricing matrix can be used to determine the annual cost per user.

11.2 Project Management

The Citizenserve project manager will have primary responsibility for the project. The project manager will be responsible for project management on the project, including ensuring the requirements of the Town are met; overseeing the agile implementation process; and providing communication, scope, schedule, resource, change, issue, and quality management. Project management will be provided for a fixed fee of $11,300.

11.3 Implementation, Configuration, & Training

Implementation, configuration, and instructor-led online (web conferencing) training are provided for a flat, one-time fee of $1,500 per named user.

11.4 Data Migration

We provide a fixed price for data migrations. We run multiple testing cycles for data migration prior to go live to catch any errors in the custom conversion scripts. The cost of data migration depends upon the number and type of databases that will be converted. The cost to migrate the Town's Edmunds GovTech data documents is $10,500; we are assuming based upon comments in the RFP that this data is only for permitting and code enforcement.

11.5 System Integrations

We have provided pricing for the following integrations:

- ESRI GIS,
- TBD payment processor (assumes one of the over 30 payment processors to which we have already integrated),
- Laserfiche,

- Auth0 for SSO,
- Auth0 for MFA,
- FTP of financial data to Tyler Munis.

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

Systems Integration	Fixed Price
ESRI GIS	$10,000
TBD Payment Processor	$0
Laserfiche	$5,000
Auth0 for SSO	$1,000
Auth0 for MFA	$5,000
FTP of financial data to Tyler Munis	$2,500
Total Integration Price	**$23,500**

11.6 Citizenserve Budget Matrix

We have provided a three-year budget matrix for 15 users based on our understanding of your needs as outlined in the RFP and answers to questions.

Cost Element	Year 1	Year 2	Year 3
Annual Citizenserve Subscription (15 users)	$31,500	$31,500	$31,500
One-Time Initial Fees			
Project Management	$11,300		
Citizenserve Implementation, Configuration, & Online Training (15 users)	$22,500		
Data Migration of GovTech permits, code enforcement	$10,500		
Integration to ESRI GIS	$10,000		
Integration to TBD Payment Processor	$0		
Integration to Laserfiche	$5,000		
Integration to AUTH0 (Azure) for SSO	$1,000		
Integration to AUTH0 (Entra ID) for MFA	$5,000		
FTP of financial data to Tyler Munis	$2,500		
Total One-Time Fees	$67,800		
Total Annual Fees	**$99,300**	**$31,500**	**$31,500**

Citizenserve Three-Year Budget for Irondequoit, New York (15 users)

SECTION 12 – ASSUMPTIONS & TOWN RESPONSIBILITIES

12.1 Assumptions

We made the following assumptions when developing the Town's project schedule:

- We assume that the Town team will collect the required information on the setup checklist provided by Citizenserve prior to the beginning of the project, including copies of permit and license applications, fee schedules, letters and notifications, etc. The timely start of the project depends upon the collection of this information.
- We assume that knowledgeable subject matter experts from each area will be available for the weekly walkthrough meetings as scheduled.
- We assume that Town team members will complete their assignments in the days between the weekly walkthrough meetings.
- We are assuming the Town would like training to enable their own system administrators to perform system administration tasks. We have therefore included this training in the schedule in Phase 1. If the Town would rather have Citizenserve provide all system administration, this is included in our unlimited support at no additional charge.
- We assume the Town will ensure the attendance of all users and system administrators in training classes.

12.2 Town Responsibilities

We have provided a staffing plan below that breaks out the resource requirements for the Town.

Town Anticipated Hours by Project Role			
Town Project Role	**Estimated hours per month**	**Estimated number of individuals required for role**	**Additional Comments**
Executive Sponsor	As needed.	1	
Project Manager	25 – 40% FTE	1	
Functional Area Lead(s) – Assuming one lead per Department	Approximately 10% FTE during project.	Typical number is 1 per functional area.	For a functional area such as Business Licensing, 1 FTE is typically appropriate. For a functional area such as Permitting, where there may be multiple specialties depending upon permit type, additional functional leads are typically required when configuring the associated permits. Based on the System Users listed in the RFP, Permitting leads for the Town may include: • Planning • Zoning • Fire Marshal • Public Works • Assessing • Legal
Subject Matter Expert(s) – Note: one SME may serve as SME on two or more modules/functional areas	Approximately 20% FTE during project.	Typical number is 1 – 3 per functional area.	For a functional area such as Business Licensing, 1 SME is typically appropriate and is typically also the Functional Lead (total FTE is approximately 20%). For a functional area such as Permitting, where there may be multiple specialties depending upon permit type, additional SMEs are required when configuring the associated permits. Based on the System Users listed in the RFP, Permitting SMEs for the Town may include staff from the following departments:

			• Planning • Zoning • Fire Marshal • Public Works • Assessing • Legal Typical SME roles include: • Clerk • Coordinator • Plan Reviewer • Inspector • Building Official
Finance/Revenue Subject Matter Expert(s)	Approximately 5% FTE during project.	Typical number is 1 – 2.	Time is required to map fees and fines to GL codes and during discussions of required daily payment reports, reconciliation reports, etc.
GIS Lead	Typically 2 – 10 hours at the beginning of the project.	1	We configure the GIS integration at the beginning of the project so the customer is using familiar addresses and parcels.
Integration Lead	If needed, 10 – 20% during system integration.	Potentially 1 integration lead per integration, depending on any configuration required on the Town side.	If APIs are available and no configuration of Town systems are required to accept data from or send data to Citizenserve, there is no need for an integration lead. In the case of integrations such as Active Directory that require configuration on the Town side, 1 or more integration leads are required.
System Administrator	If needed, 4 – 10 hours for training.	0 – 1	System administration is covered under Citizenserve's unlimited support; the Town can choose to not assign a system admin. If one or more system admins are desired, they should be available for training. Unlimited system admin training is included with support, so help is available any time.

Reporting Lead	If needed, approximately 20% during project.	0 if the Town uses Citizenserve for unlimited support development. 1 per functional area if the Town elects to create their own reports.	Unlimited custom report development is included as part of Citizenserve's unlimited support; average turnaround time is less than a day. If the Town wants its own resources to handle reporting, we are assuming there will be one reporting lead per functional area. Each reporting lead should attend the weekly walkthroughs for their functional area to ensure they understand the data and the processes that populate the data, as well as 4 – 10 hours of training.
Organizational Change Management Lead	Approximately 20% for approximately a month.	1	Some customers choose to develop communication plans, videos, and other vehicles to educate the larger community.

SECTION 13 – EXCEPTIONS TO RFP/ CONTRACT TERMS

We have no exceptions to the Town's RFP or contract terms provided therein.

SECTION 14 – REFERENCES

<table>
<tr><th colspan="2">Reference 1: Clifton Park, New York</th></tr>
<tr><td>Contact Name: Wade Schoenborn</td><td>Contact Title: Director of Building and Development</td></tr>
<tr><td>Contact Phone: 518-371-6702</td><td>Contact Email: wschoenborn@cliftonpark.org</td></tr>
<tr><td>Citizenserve Modules and Functionality:
Live:
• Building Permits,
• Planning & Zoning,
• Code Enforcement,
• Online Portal.</td><td>Additional Services:
System Integration:
• ESRI GIS,
• Forte payment processor,
• Laserfiche.

Data Migration:
• Municity.</td></tr>
<tr><td colspan="2">Overall Project Scope:
• A fully integrated community development solution.
• Configured Building permits and related reviews, workflows, inspections, and notifications.
• Configured Planning & Zoning applications and related reviews, workflows, inspections, and notifications.
• Configured Code Enforcement and related complaints, workflows, violations, fines, and reporting.
• Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.
• Configured multiple integrations and migrated data from a legacy system.
• Developed dozens of custom reports, custom metrics, and user dashboards.</td></tr>
<tr><td colspan="2">Implementation: February 2022 – May 2023</td></tr>
</table>

Reference 2: Dunkirk, New York	
Contact Name: Wanda Zawadzki	**Contact Title:** Housing, Building, and Zoning Officer
Contact Phone: 716-366-9879	**Contact Email:** wzawadzki@cityofdunkirk.com
Citizenserve Modules and Functionality: • Permitting; • Development Projects; • Electrical Licenses; • Code Enforcement, • Online Portal.	**Additional Services:** System Integration: • Chautauqua County GIS. Data Migration: • BAS IPS.
Overall Project Scope: • A fully integrated community development solution. • Configured Building permits and related reviews, workflows, inspections, and notifications. • Configured Code Enforcement and related complaints, workflows, violations, fines, and reporting. • Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments. • Data migration from legacy BAS IPS system. • Configured integration to the County's GIS. • Developed dozens of custom reports, custom metrics, and user dashboards.	
Implementation: February 2023 – May 2023	

Reference 3: Richfield, Minnesota

Contact Name: Chad Lunder	**Contact Title:** Chief Building Official
Contact Phone: 612-861-9862	**Contact Email:** clunder@richfieldmn.gov
Citizenserve Modules and Functionality: • Building and Right of Way Permitting; • Planning and Zoning; • Vacant Building Registration; • Code Enforcement; • Business Licensing; • Online Portal.	**Additional Services:** System Integration: • ESRI ArcGIS, • OpenEdge Host Pay payment processor, • Laserfiche. Data Migration: • Access database, custom SQL Server database.

Overall Project Scope:

- A fully integrated community development solution.
- Configured Building and Right of Way permits and related reviews, workflows, inspections, and notifications.
- Configured Planning and Zoning applications and related reviews, workflows, inspections, and notifications.
- Configured Vacant Building Registration and Code Enforcement and related complaints, workflows, violations, fines, and reporting.
- Configured business licensing and related reviews, workflows, and notifications.
- Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.
- Configured multiple integrations.
- Developed dozens of custom reports, custom metrics, and user dashboards.

Implementation: September 2022 – May 2023.

Resolution No. 2026 - ___

EXTRACT OF MINUTES OF MEETING OF THE TOWN BOARD AUTHORIZING THE APPROVAL OF A WEBSITE REDESIGN AND CONTENT MANAGEMENT SYSTEM AGREEMENT WITH REVIZE LLC

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York, held at Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the ___ day of _____ 2026 at 7:00 P.M. local time; there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Town Board Member
Peter Weishaar	Attorney to the Town

Town Board Member _____ offered the following resolution and moved its adoption:

WHEREAS, the Town of Irondequoit seeks to modernize and redesign its official municipal website to improve accessibility, transparency, communication with residents, and overall digital service delivery; and

WHEREAS, Revize LLC has submitted a proposal dated January 27, 2026 for the design, development, hosting, training, and implementation of a new municipal website and Government Content Management System (CMS); and

WHEREAS, the proposal includes a total one-time project cost of $29,800.00 for planning, design, development, content migration (up to 400 webpages and 1,200 documents), quality assurance, training, and go-live services; and

WHEREAS, the Town Board has reviewed the proposal and finds that the Revize Government CMS platform provides responsive web design, WCAG 2.1/2.2 accessibility compliance tools, cloud hosting infrastructure, disaster recovery services, and integrated municipal applications appropriate for the Town's needs; and

WHEREAS, funding for the initial project cost is available in the current budget and the annual hosting and support fees will be appropriated in future operating budgets;

NOW, THEREFORE, BE IT RESOLVED, that the Town Board hereby approves the proposal from Revize LLC dated January 27, 2026 for the redesign and implementation of the Town's official website for a one-time project cost not to exceed $29,800.00; and

BE IT FURTHER RESOLVED, that the Town Supervisor is hereby authorized to execute any and all agreements and related documents necessary to effectuate this project; and

BE IT FURTHER RESOLVED, that this resolution shall take effect immediately upon its adoption.

Seconded by Town Board member _____ and duly put to vote, which resulted as follows:

Town Board Member	Wehner	voting _____
Town Board Member	Malone	voting _____
Town Board Member	Cunningham	voting _____
Town Supervisor	Perticone	voting _____

revize.

The Government Website Experts

A Website Proposal for

The Town of Irondequoit, New York



Proposal Prepared by:
Thomas J. Jean
Thomas.Jean@revize.com
Ph: 248-269-9263 x 8035
www.revize.com

January 27, 2026
Proposal valid for 90 days

revize.
The Government Website Experts

Table of Contents

Revize New York Clients!	3
Revize Clients!	4
Company Details	7
Company Overview	9
Municipal Experience	10
References	16
Awards & Accolades	20
Project Management	21
Project Timeline	23
Revize Project Life Cycle	24
Revize Project Team	34
Cloud Hosting, Disaster Recovery, & Security	37
Revize AI ChatBot	42
Revize AI Search	43
Accessibility & Compliance	44
WCAG 2.1 & 2.2 Accessibility Compliance	44
Accessibility Strategy – During the Project	44
Accessibility Strategy – After Go Live – WCAG Scan & Remediation Service	45
RZ Assist – Website Accessibility Widget and Scan Tool	46
Itemized Fees	50
Optional Add-Ons	51
Revize Support Includes	54
Citizen's Communication Center Apps	55
Citizen's Engagement Center Apps	59
Staff Productivity Apps	60
Mobile Device and Accessibility Apps	64

Revize New York Clients!

- DeWitt, NY — www.dewittny.gov
- Fairport, NY — www.village.fairport.ny.us
- Johnstown, NY — www.townofjohnstown.org
- Larchmont, NY — www.larchmontny.gov
- Niagara Falls, NY — www.niagarafallsusa.org
- Oneonta, NY — www.oneonta.ny.us
- Piermont, NY — www.piermont-ny.gov
- Philipstown, NY — www.philipstown.com
- Rochester, NY — www.townofrochester.ny.gov
- Rye, NY — www.ryetownny.gov
- West Haverstraw, NY — www.westhaverstraw.gov
- And Many More!

Revize Clients!

- Des Moines, IA — www.dsm.city
- Eagle County, CO — www.eaglecounty.us
- Glencoe, IL — www.villageofglencoe.org
- Golden, CO — www.cityofgolden.gov
- Hamilton County, OH — www.hamiltoncountyohio.gov
- Hilton Head Island, SC — www.hiltonheadislandsc.gov
- Largo, FL — www.largo.com
- Olympia, WA — www.olympiawa.gov
- Pasco County, FL — www.pascocountyfl.net
- St. Petersburg, FL — www.stpete.org
- Troy, MI — www.troymi.gov
- And Many More!

Dear Town of Irondequoit,

Thank you for considering Revize as your web development partner. For nearly two decades, Revize has been a leader in providing high quality, government-compliant web solutions. Located in Troy, Michigan we have launched hundreds of government websites nationwide, including nearly 200 right here in Michigan, a myriad of industry awards and hundreds of satisfied clients stand as testament to the quality and value of our work.

Visitors are drawn to websites that are appealing yet functional, user friendly with a plethora of services, and accessible on a wide range of devices. A Revize website will allow your residents and businesses to easily fill out and submit documents, review and pay bills and taxes, perform searches to answer frequently asked questions and perform a suite of other tasks that would otherwise require staff assistance. What's more, a Revize website will enable you to increase staff productivity and decrease costs by reducing off-line departmental operations.

Some of our great clients in include:

- City of Largo, FL largo.com - Award Winner
- Eagle County, CO eaglecounty.us - Award Winner
- City of St. Petersburg, FL stpete.org
- City of Des Moines, IA dsm.city - Award Winner
- City of San Carlos, CA cityofsancarlos.org - Award Winner

"Revize Websites build engagement with your constituents."

"revize websites build engagement with your residents"



We will work closely with you to design and develop a dynamic, functional and easy to navigate website that will perfectly fit your community.

Then we empower you to control your digital presence with the industry's best administrative management applications. Revize training ensures that your team has the skills needed to expertly update and manage website content and delivery.

Thomas J. Jean
Program Manager

With over a decade experience building government websites

Government clients select Revize because we can help them

- Effectively engage residents.
- Enhance their web presence and build an online communications center.
- Empower non-technical web content editors and administrators to easily execute changes.
- Implement a scalable solution that allows them to affordably grow their web presence for the long term.

We have worked hard to establish a reputation for creating online community websites that engage, inform, and increase participation of your community. With our help, your community's website can serve your residents better, inspire them more, and get them actively involved in your government. Please contact me if you have any questions at all.

Sincerely,

Thomas J. Jean
Program Manager
Phone: **248-269-9263 x8035**
Email: **Thomas.Jean@revize.com**

Company Details

Thank you for considering Revize Software Systems for your new website project. We understand the importance of this undertaking and know how motivated your government/community is to selecting the right vendor; one who will work with you through all the steps required to build the perfect website featuring a plethora of high quality online services that your constituents will want to use regularly.
In more than two decades of working with government leaders, as well as through nationwide surveys, we have learned that the key to choosing a website vendor is finding the right balance between the total cost of the solution and the quality of the design, online apps and user functionality. In simpler terms, you need a solution that works for you and serves your constituents.

About Us
With approximately 3,000 government websites launched nationwide, Revize Software Systems is one of the industry's leading providers. We credit our rapid growth to our 20-year track record of building award-winning government websites and content management systems. When you work with Revize, you're not just a client, you become part of the Revize family anwhd will receive the service and support you need and expect! We are among the most highly respected government website experts in the United States and we proudly stand by our work.

Our Innovative Responsive Web Design (RWD) and Web Apps
Revize has been a pioneer in implementing the latest trends in design by using Responsive Web Design (RWD). This technology ensures that site visitors have an optimal viewing experience — easy reading and navigation with a minimum of resizing, panning, and scrolling — across a wide range of devices, from desktop monitors to mobile phones. RWD provides flexible and fluid website layouts that adapt to almost any screen. When you implement a dynamic new website powered by Revize, you will not only get an outstanding look, layout and navigation, but you also receive 24/7 access to our Government Communication Center for residents, business and visitors.

Here you will find the communication tools you need such as:

- Public Service Request App
- Calendar of Events
- E-Notification Modules
- On-Line Payment Portal
- Facilities Reservations
- News Center with Facebook/Twitter Integration
- Emergency Alerts
- Online Forms / Survey Tools
- E-Newsletter Applications
- Job Posting and Tracking Module
- Public Records Request Tracker

Our Award-Winning Government CMS

Revize is renowned as a leader in providing practical, high-value, easy to use content management software Government CMS. This simple-to-use yet powerful solution enables clients to manage their online presence with high functionality and style. With applications such as an online document center, public service request app, public records request tracker, agendas and minutes, frequently asked questions and more, Revize ensures that our clients have the tools they need to make information and services available for website users at the click of a mouse.

Quick Deployment, Personalized Training and Support

Revize addresses time concerns by completing websites in considerably less time than our competitors. And because our software is so easy to use, we are also able to effectively train our clients in less than half the time it takes our competitors. Our training program is customized based on each client's needs, and we provide hands on training the way you want it - either onsite or off site through web conferencing tools. We pride ourselves on the skills of our support staff, who are responsive, knowledgeable and helpful. Our online support portal is available 24/7/365 for issue tracking and management. We also provide phone and email support during regular business hours.

Did you know?

Our technical support staff are trained developers. When you call for tech support, you'll be speaking to staff with direct knowledge of development!



Company Overview

Founded	Headquarters	Phone	Website
1995	150 Kirts Blvd. Troy, MI 48084	248-269-9263	revize.com

Revize Software Systems was founded in June, 1995 as a "new media" development company specializing in the creation of interactive web design, multimedia content delivered on CD-ROM, and video production. Since then, Revize has made an unsurpassed name for itself in government website design, which remains our specialty. We now boast more than 3,000 websites launched in North America and have created acclaimed website designs for hundreds of municipalities and counties, as well as government departments and agencies. In September, 1996 as the Internet was becoming a world-wide reality, Revize began developing a Web Content Management System (CMS) for the government market to enable non-technical contributors to quickly and easily update content on their websites. The result was the creation of our state-of-the-art Revize Government CMS. Our mission has always been to enhance the communications of government organizations nationwide with their varied and valued audiences. This is based on our vision statement, which reads:

> "The empowerment of people through simplified information management technologies."

Focused exclusively on creative web design, government web apps and content management technologies, Revize continues to invest in its technology, continually adding new capabilities and features that manifest our vision. While many municipalities choose Revize to develop and cost-effectively manage their website content, clients also use Revize as an information-sharing platform. Our suite of Revize Government web-based solutions has proven valuable as a powerful technology that empowers clients to build and maintain sophisticated web sites, all while using the Internet and internal Intranets/Extranets to acquire, analyze, process, summarize and share information



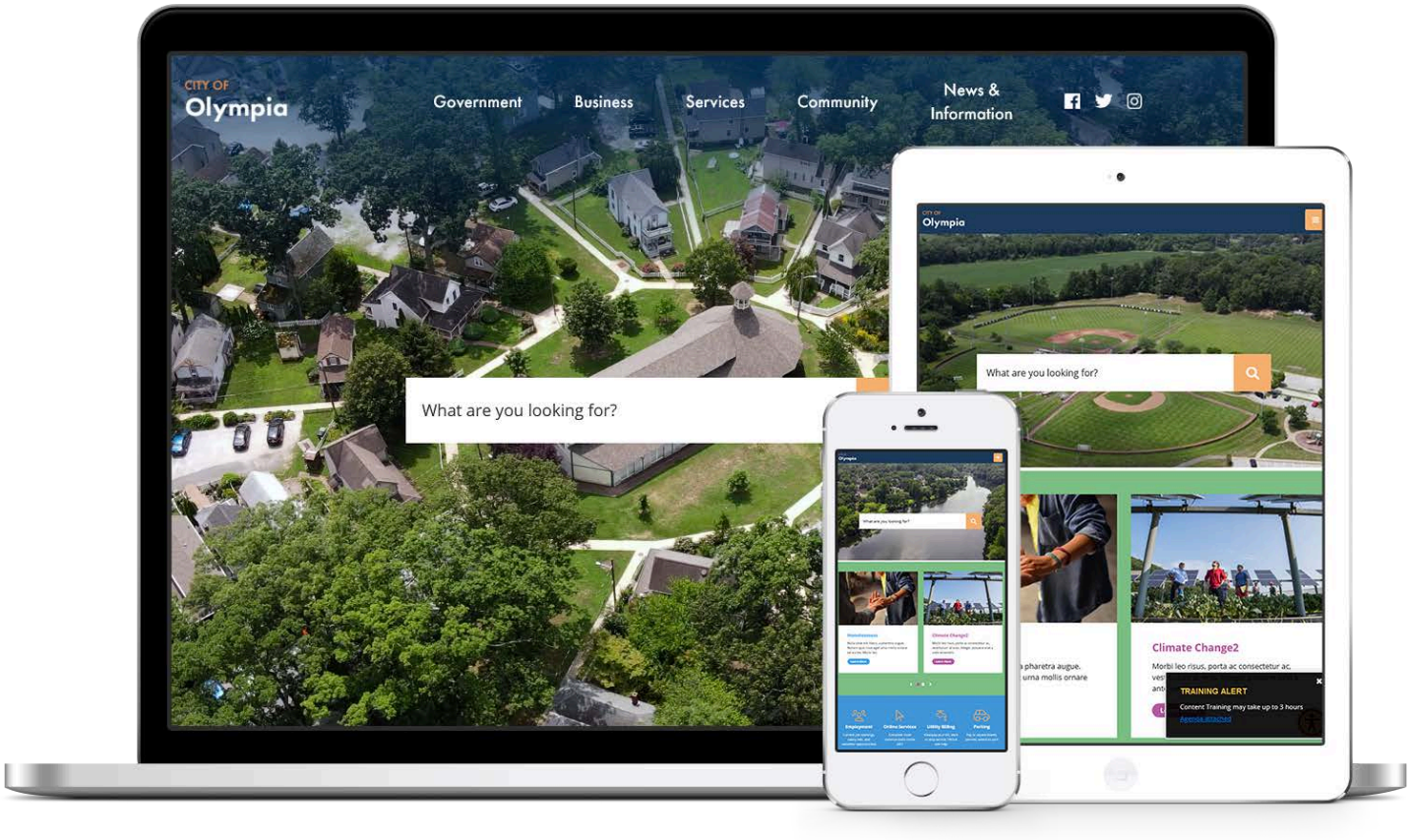
Did you know?
Revize has won national awards for our websites!

Municipal Experience

The City of Olympia, Washington

Olympiawa.gov

3CMA Savvy Award Winner

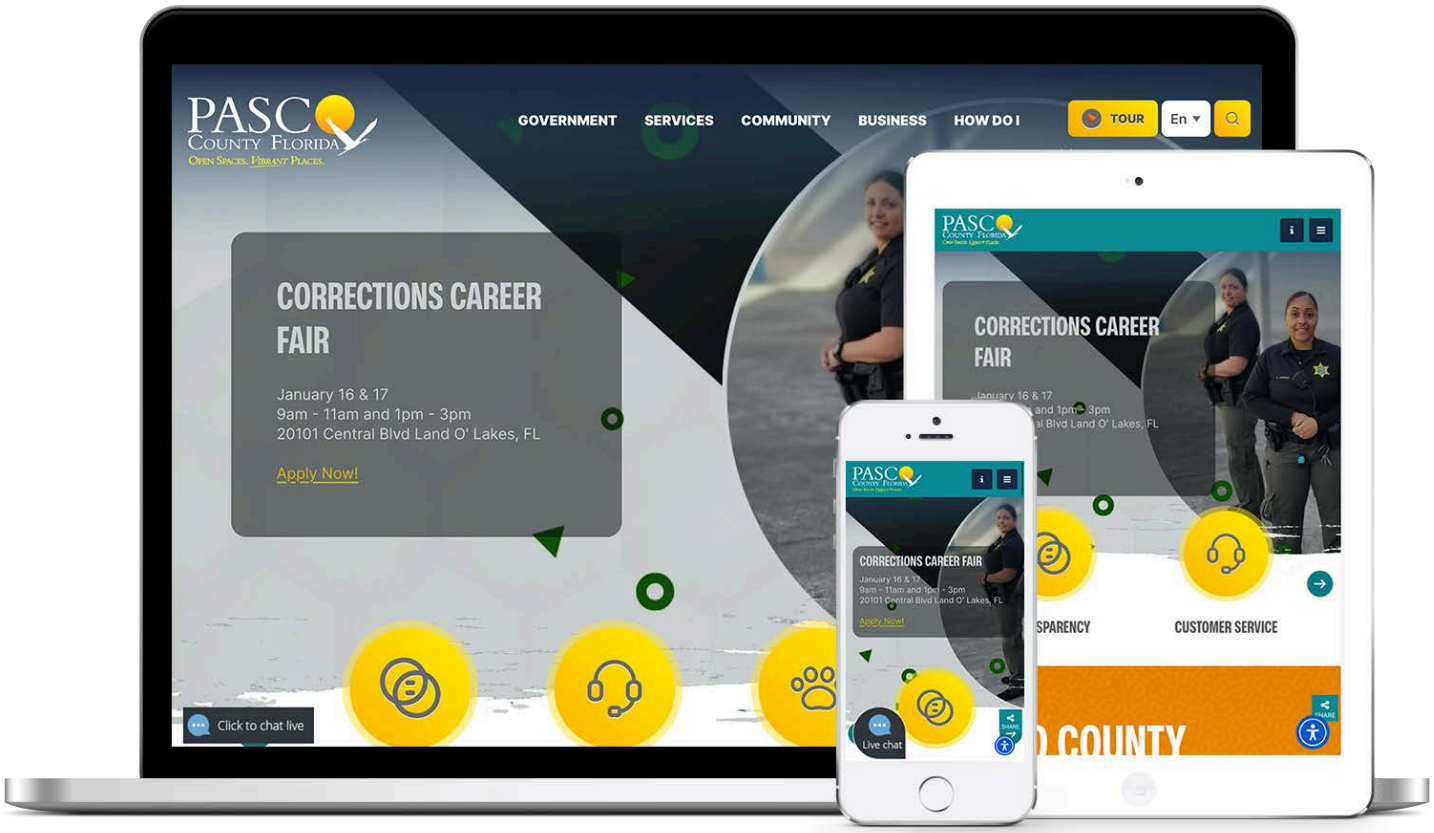


Details:

The City of Olympia, Washington's capital, provided an exceptional opportunity for Revize and the city's web team. Their website showcases an innovative homepage where users can seamlessly navigate through various trending topics, services, news, events, and more in a modern layout. We aimed to create not just visually stunning, but highly functional, site—one that stands out as among the most inspiring and practical in the United States. With distinctive design elements, including a curated "smart search" feature and interactive online forms, this website makes a compelling case for its title!

Pasco County, Florida

www.pascocountyfl.net



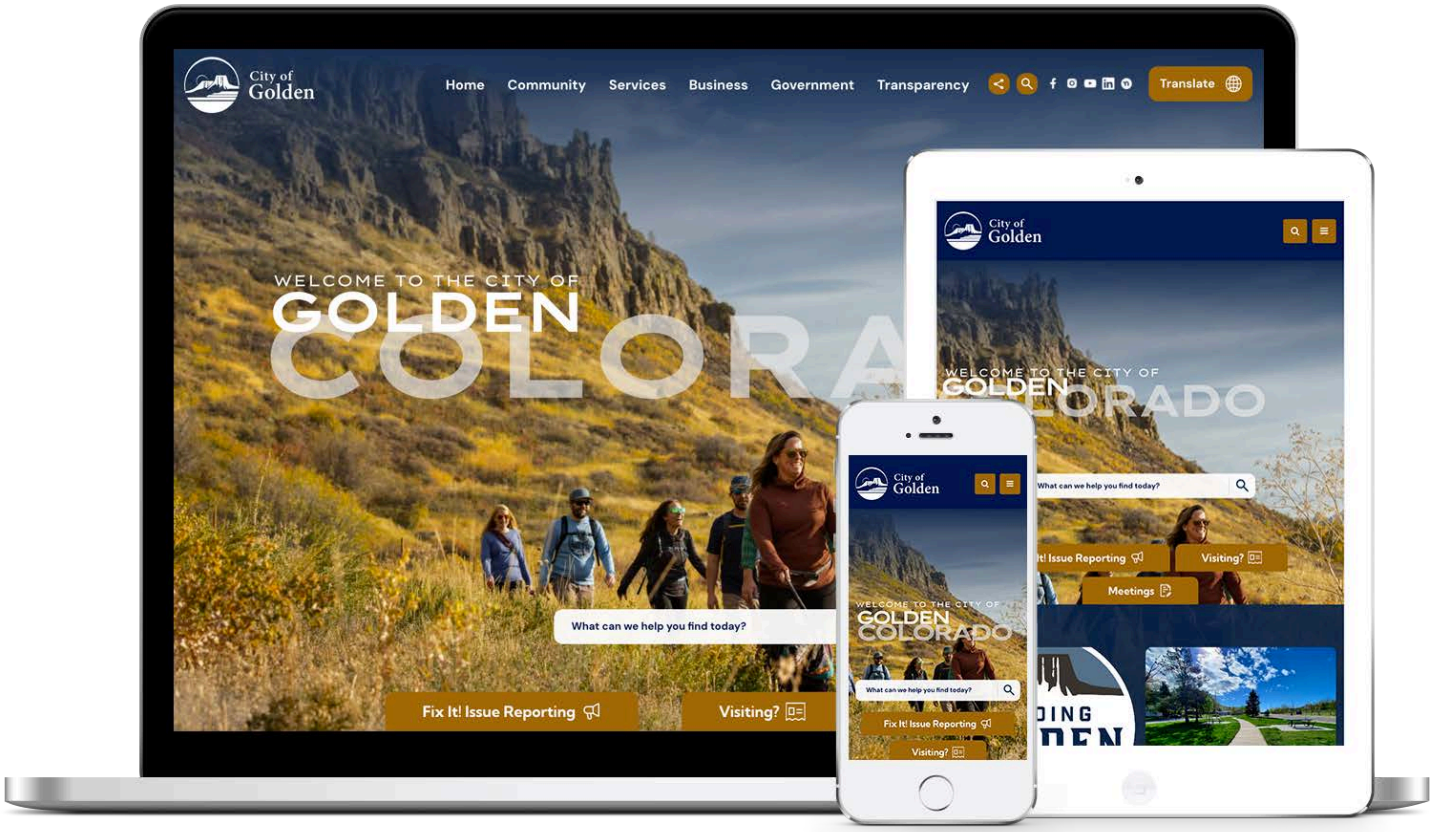
Details:

Pasco County, a Florida County of nearly 600,000 residents, came to Revize wanting the best website possible for their constituents and a true partnership with their website vendor. Having previously experience less than stellar service from another vendor, the county was ready for a quick change. Together, Revize and Pasco County launched this website, and an employee intranet in less than four months. This is a fantastic representation of the things Revize is able to accomplish with a motivated County like Pasco!

HORIZON INTERACTIVE AWARDS
GOLD WINNER

City of Golden, Colorado

www.cityofgolden.gov



Details:

The City of Golden, CO came to Revize for a website that was completely different. Coming from an outdated website, they wanted to work with a vendor that could turn their website into a site iconic in Colorado. Page layouts were created to allow unique interaction with the City. This included board listings, Q&As, interactive park directories, and a resident focused navigation. This site improves the online experience for residents, business owners, and visitors!

HORIZON INTERACTIVE AWARDS
GOLD WINNER

La Plata County, Colorado

www.co.laplata.co.us



Details:

La Plata County CO wanted a design unlike any County out there. With this design we pushed the limit of what people think when they see a County website. They also needed the website to be accessible according to a new Colorado accessibility standard. In addition, this site features additional unique subsites and healthy level of scrolling. We use images, icons, and interactive features to create an experience for the user. This type of design also allows us to extend the County's brand in a way that is unmatched in the industry!

City of St. Petersburg, FL

www.stpete.org

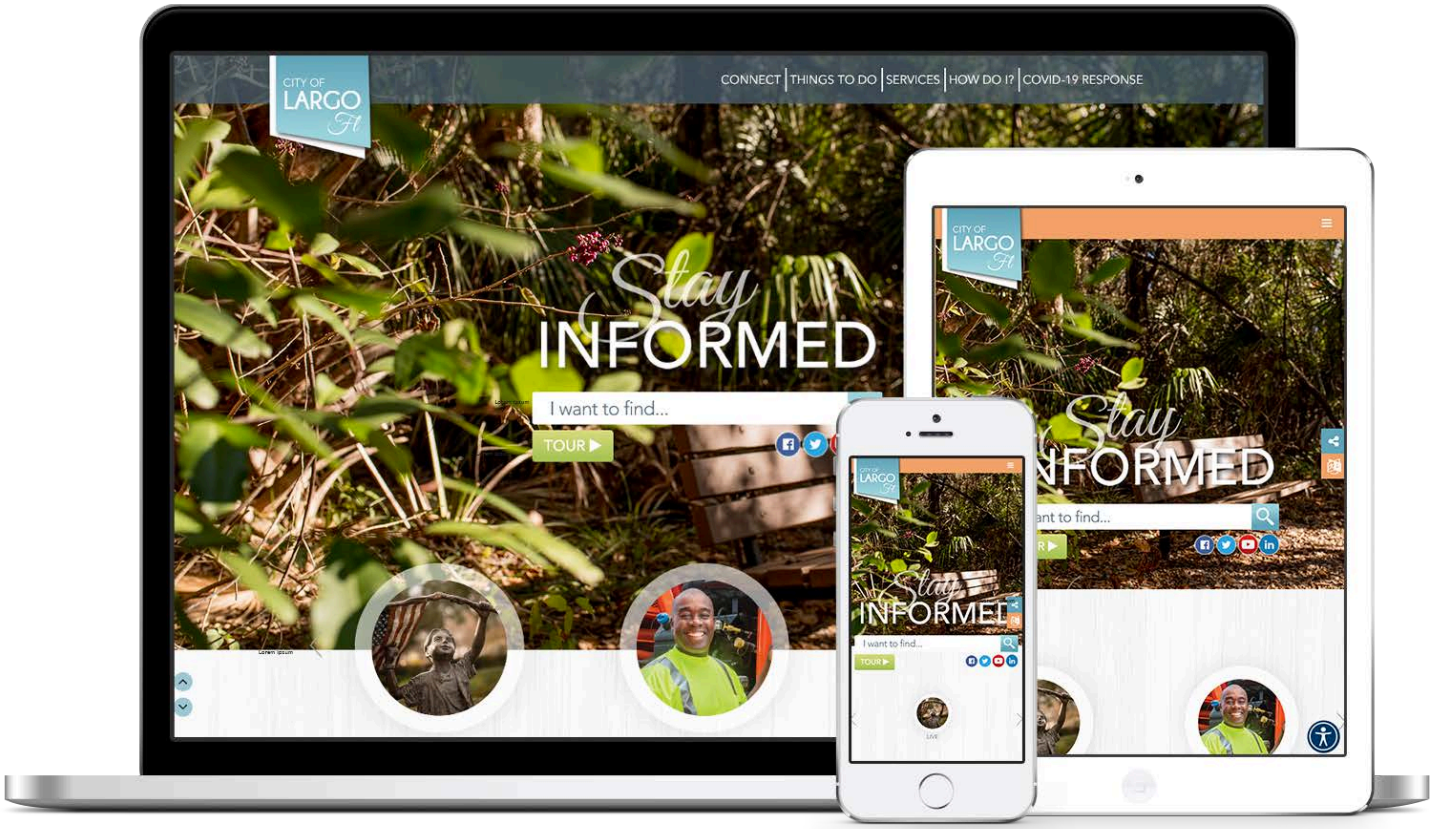


Details:

As Florida's 5th largest, St. Petersburg is an iconic City with something to offer everyone. Because St. Pete is a longtime Revize client, their team worked very closely with ours and actually provided their own design concepts. We did the integration/pre-launch work and their staff was with us every step of the way. Inner pages are flexible to allow departments to have dedicated pages with a cohesive feel across all pages. Social media feeds from Instagram, Flickr, Facebook, Twitter, and YouTube all on the homepage! St. Petersburg also users the Revize API to develop their own templates. This website is an elite representation of the power and beauty of the Revize process.

City of Largo, FL

www.largo.com



Details:

Largo, Florida wanted a website like no other. Through a collaboration between the city marketing team and Revize, we were able to create this award winning website. Each page in this website was designed to uniquely fit the needs of the community. We also built unique designs for the city parks, library, and theater. The navigation within this site is built based on services rather than department silos. Overall this website brings together an amazing mix of design expertise and functional clarity to create a great user experience!

References

Client: Town of Hilton Head Island, SC
Rene Tuttle, Website Developer
Phone: (843) 341-4792
Email: renep@hiltonheadislandsc.gov
Website: hiltonheadislandsc.gov

Client: City of Golden, CO
Meredith Ritchie, Communications
Phone: (303) 384-8132
Email: mritchie@cityofgolden.net
Website: www.cityofgolden.net

Client: City of Gardner, KS
Daneeka Marshall-Oquendo
Phone: (913) 856-0912
Email: dmarshall-oquendo@gardnerkansas.gov
Website: www.gardnerkansas.gov

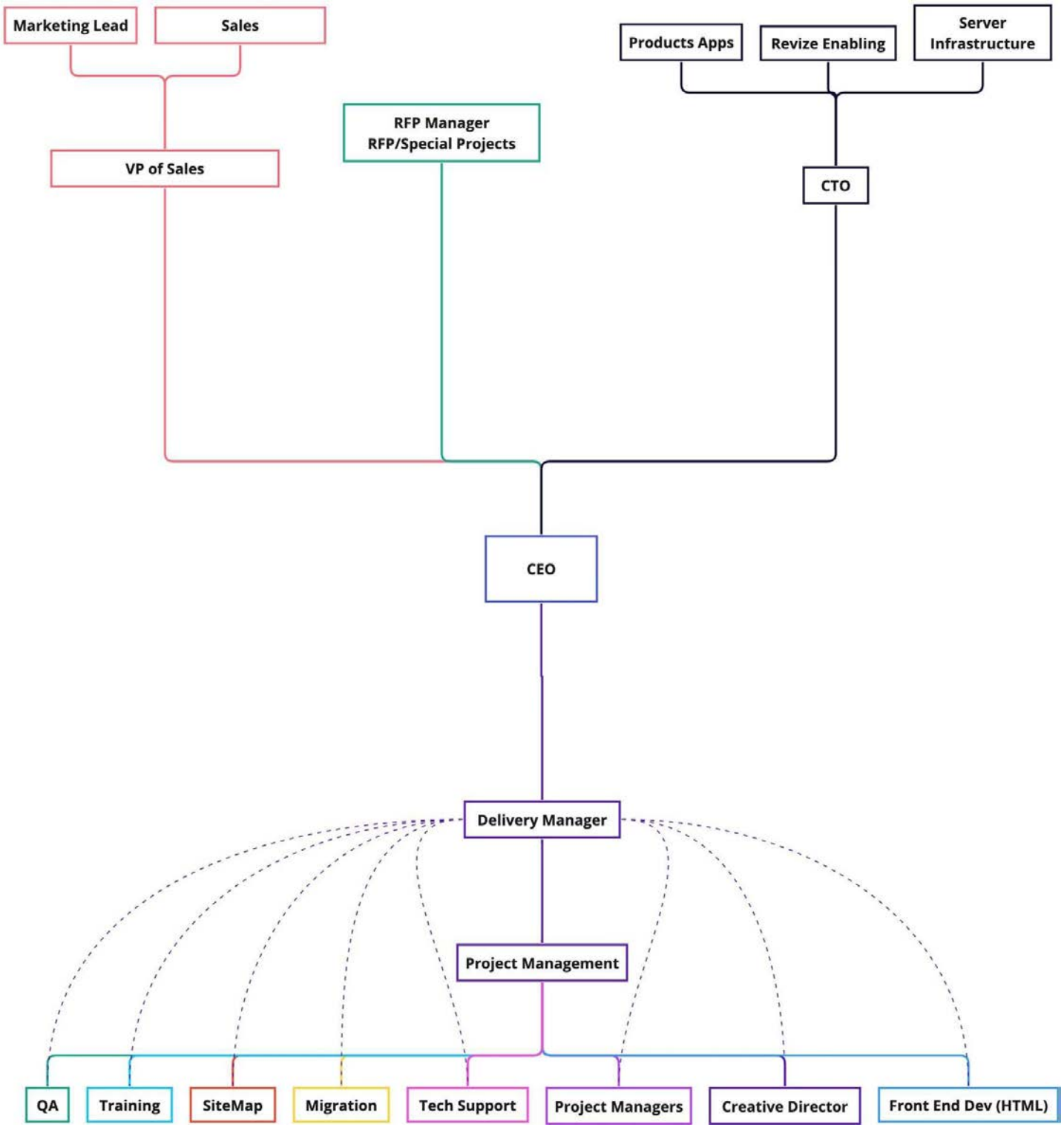
Client: City of Conroe, TX
Andrew Yousse, PIO
Phone: (972) 516-6016
Email: ayousse@cityofconroe.org
Website: www.cityofconroe.org

Client: Pasco County, FL
Bryan Shaw, Website Administrator
Phone: (727) 815-7177 ext. 8226
Email: bshaw@mypasco.net
Website: pascocountyfl.gov

Client: Fayette County, GA
Cintia Listenbee, Community Engagement Specialist
Phone: (770) 305-5109
Email: clistenbee@fayettecountyga.gov
Website: www.fayettecountyga.gov

Client: City of Olympia, WA
Joshua Linn, Website Administrator
Office: (360) 570-3782
Email: JLinn@ci.olympia.wa.us
Website: olympiawa.gov

Revize Organization Chart



Why Choose Revize?

We Have Government Specific Experience and Outstanding Client Testimonials
You can rely on Revize and our 20 years of experience building and maintaining websites for municipal, county and government agencies of all sizes throughout North America, to deliver a customized site design that improves layout, navigation, usability and content. Using Revize ensures that your website will be reliable, W3C and ADA compliant, and allow for easy integration with existing or future web applications and third-party software. But there's no need to take our word for it -- we encourage you to peruse our massive file of testimonials from our many satisfied clients.

We Will Build a Government Communication Center that Works for Your Community!
The Revize website design, Government CMS and interactive tool sets have been developed exclusively for our government clients to help them effectively communicate with their key target audiences such as residents, businesses and visitors. Some of our most popular website and Government applications and modules include: a new and improved Online Calendar, the comprehensive Forms Center, our News Center with real-time social media connectivity, Emergency Alerts, E-Notifications, Citizen Request Tracker, Parks & Shelter Reservations System, Document Center, and Online Payment Portal.

What sets Revize apart from other companies?
Revize's superior technical architecture, unsurpassed staff expertise and highly effective publishing engine provide our government clients with the most reliable website solutions in the industry today. By ensuring our client's data security and providing redundant server architecture and back-up data centers, Revize has a nearly 100% up-time rate. Plus, our clients never have to worry about data loss or data corruption because of our instantaneous back-up process and our data center's cloud back-up processes. Revize believes that investing a higher percentage of our profits into our technology and security makes us the best choice for the short and long term for governments seeking the best value for their community's website.

"We Always Provide Knowledgeable, Friendly and Responsive Service!"

All this, and a reliable IT partner too! Our website development is superior, and our Government CMS and suite of online apps is easy to learn and administer, but our 24/7 technical support will also be there for you to help you get over the hurdles! Our technical support team is widely considered to be among the industry's best. We also provide a sophisticated backup infrastructure which allows us to guarantee 99.99 percent uptime. Plus regular updates and improvements to ensure that your site will remain current with industry standards and keep running smoothly for years to come. The Client Owns the CMS License and the Code!

We often hear the question: "What happens if we want to move the website to another vendor? Do we lose all access or any of our website data?" The answer is 100% NO! As our client, you own the template source code, the CMS, and any data that you put onto the website. We understand that clients may come and they go, but we always make sure they know they are just as important to us at the end of our tenure as they were at the beginning. If you decide to run the CMS in your own server, we can transfer the CMS license and software to your server as you own the license and you can run it from your server as long as you want.

Top Reasons Why Revize gives you the Greatest Value!

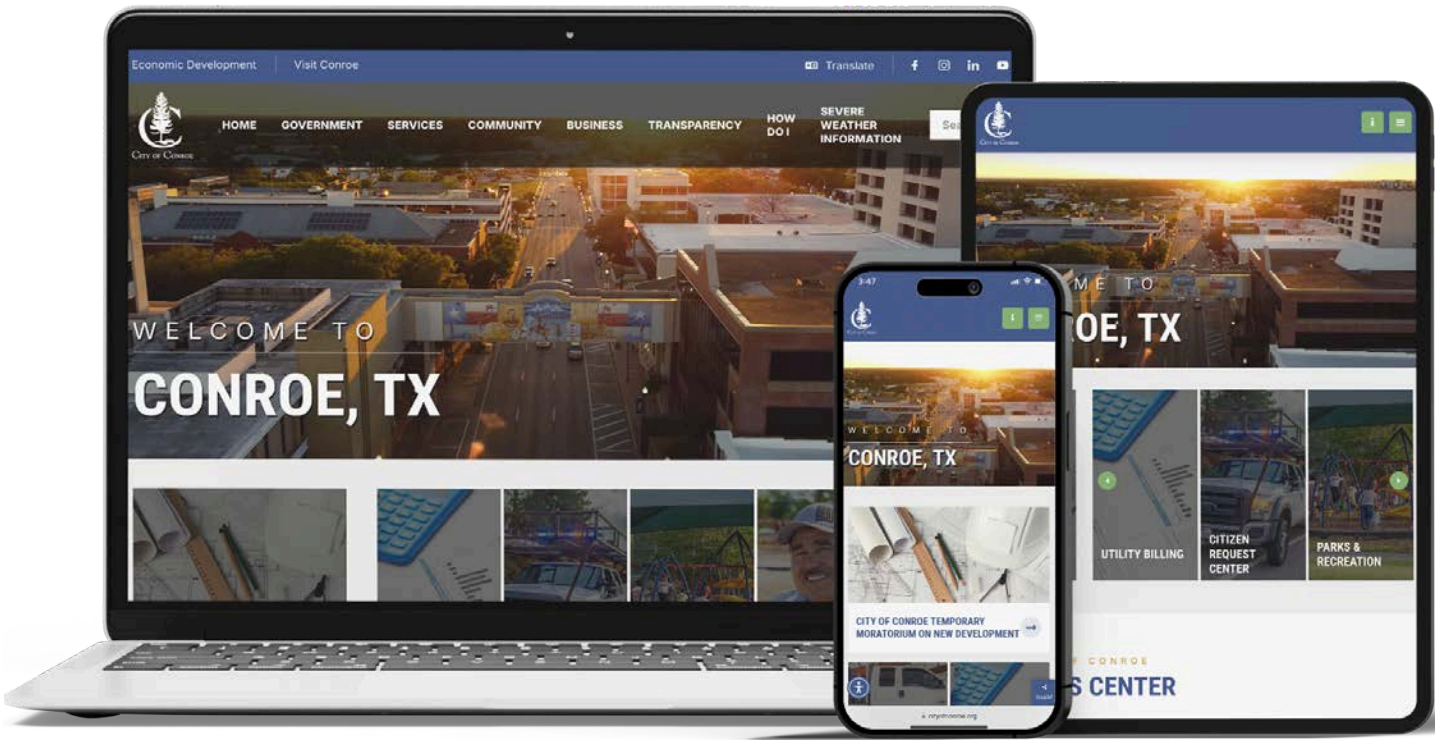
- Modern, timeless and unique website design integrated with online Government apps
- On-time delivery
- Competitive pricing
- Responsible stewardship of the organization's stakeholders
- Full functionality to update and manage your website
- All the tools/apps needed to increase communications with citizens
- An easy CMS to train employees quickly
- Extended phone and email support
- Unlimited Upgrades: Revize provides unlimited upgrades to new and existing modules at no additional cost to you. Once you invest in Revize, you will receive free upgrades and feature enhancements for life.

Awards & Accolades

"When I shared my ideas and vision for a website designed to provide a quick, efficient, and user-friendly experience for our citizens, Revize played a vital role in bringing that vision to life."

- Andrew Yousse, Communications Manager, City of Conroe Texas

Communicator Award Winner



Project Management

Project Planning and Setup

What makes Revize unique in its project approach and experience is our thorough preparation for each individual community combined with the range of website deployments and creative, customized fit we implement for each client. From small to large, rural to urban, the Revize project management process guarantees a perfect fit between the concept of the deployment and the expectations of the client's level of engagement preferences.

> We don't use a "one size fits all" approach because it doesn't make sense.

However we do use a standard, proven effective process methodology. Each client is unique and we tailor our process to fit their unique needs. For as long as you are our client you will have staff dedicated to your account and access to an on-line portal for communication, design process and on-going support.

Dedicated Accounts Manager: Your dedicated Account Manager will handle all issues related to your contract, pricing, future product add-ons, and general account satisfaction. During the initial kick-off meeting, your Account Manager will introduce you to the team, explain roles and responsibilities, and place you in the very capable hands of your Dedicated Project Manager and Designer.

Dedicated Project Manager: Your dedicated Project Manager will handle all issues related to the website design, development, navigation, content, training, timelines and deliverables, as well as ensuring that feedback and communication occurs promptly in order to keep the project on-track. Also, the dedicated project manager will be the point of contact for any future technical support or issues that need to be addressed during the deployment and post deployment of the site.

24/7/365 Project Portal Access: From day one, your project and on-going support is tracked in the Revize On-line Project Portal. The main point of contact you select for the project will receive an invitation to register, including setting up a secure user name and password. The Project Portal serves as a communication tool for any matter pertaining to your website design, development and on-going support even after your website is launched.

“We guarantee the best support in the industry that’s 24/7 365 by the trained developers & technicians”



Project Timeline

Phase	Duration
Phase 1: Initial Setup & Kickoff Meeting	1 - 2 Week
Phase 2: Discovery & Design	6-8 Weeks
Phase 3A: Development	5-6 Weeks
Phase 3B: Sitemap Development	(Overlaps Phase 3A)
Phase 4: Content Migration	5-6 Weeks
Phase 5: Quality Assurance Testing	1-2 Weeks
Phase 6: Training/Go Live	2-4 Weeks
Go-Live (Average)	20-28 Weeks

Did you know?
The project planning process is designed to fit your needs. We will adapt our timeline if your schedule requires.

Revize Project Life Cycle

Phase 1: Initial Setup & Kickoff

Your Revize Account Manager will set up the initial internal project planning meeting where we will talk about the overall management of your project, establish a timeline, and devise a Revize-Client Communication Strategy that will keep everyone engaged and up-to-date on the progress of the project. We will also discuss specific technical requirements of the project and determine the phases through which those requirements will be addressed. In addition, Revize will address the content strategy of the new site, any new content that needs to be written and how to fit the existing content into the new site, Additionally, as an optional item, Revize will discuss the process of conducting online surveys to gather feedback from your constituents for the new website layout and requirements. After this meeting, Revize will develop a Statement of Work and provide it to the client for review and approval.

Prior to the design kick-off meeting, you will receive our questionnaire to complete with various answers that will help our designers gather information regarding your needs and preferences. Our team will also brainstorm ideas and suggestions with you during the meeting.

The questionnaire addresses various issues such as:

- As a result of a new website design and navigation, what are the main improvements you hope to achieve?
- What are some key points and areas you may want featured on the Home Page?
- Do you need help with logo design? Image? Marketing & branding?
- What key modules do you want featured in your web site, like Document Center, Report a Request, News & Events, Events Calendar etc.
- Do you need social media features need to be highlighted in the new site? etc..

Phase 2: Discovery & Design

Following a review of the submitted information and an assessment of your needs, you and your Revize team will participate in a Design Kick-Off Meeting. A senior designer and team will conduct an in-depth interview, and brainstorm ideas with you about your vision for the look and feel of your custom website. Our efforts on this project will extend far beyond placement of provided information within a stunning design. It's about uncovering how your audience wants to be informed, and applying our 20+ years of web design and development expertise to create the most effective ways of displaying that information and getting users to access and use your website. We always strive for nothing less than an award winning design!

Revize Design Principles

The Revize Web Application Developers are not only responsible for the look, functionality, and performance of your website. They are also responsible for the security of the web content and web-based applications they create. They ensure that the code supports secure authentication and authorization, and provides access control mechanisms as required.

Good design principles are always based on readability, taking into consideration appropriate font type and size for headlines and text area, as well as line height – ensuring all page elements are balanced. Our designers also pay meticulous attention to their use of shadows and gradients. To the layman's eye there may not appear to be a shadow, however on the website the font will appear sharper (or maybe softer depending on the amount of shadow used).

Of course color cannot be overlooked. Our designers first take the client's preferences, official logo colors, and pictures into consideration to create a color scheme consisting of no more than three colors. We then use variants and hues to create visual appeal, contrast, eye-catching allure and invoke the overall feeling that the client desires.

Last but not least is effective use of page elements such as call to action buttons, social sharing icons, email newsletter sign-up, and promotion areas. The ultimate goal is to provide an easy to navigate webpage that is informative without being overwhelming. Therefore, it is the designer's job to guide the client in making appropriate placement choices for needed items.

#1 Responsive Web Design and WCAG Compliance – Two of the most critical elements in modern government website development are Responsive Web Design (RWD) and WCAG accessibility compliance. Responsive design ensures the website automatically adapts and optimizes for any screen size, whether viewed on a computer, tablet, or mobile device, providing citizens with a seamless browsing experience across all platforms. Equally important, WCAG 2.1 Level AA compliance guarantees that all users, including those with disabilities, can access and navigate the site effectively. Together, these standards ensure the website is inclusive, user-friendly, and fully equipped to meet the expectations of today's diverse digital audience.

#2 Liquified Content – This is another important trend that address the fact that information is no longer static or concrete. Instead, content is specifically customized for each unique user. Liquidity of content enhances the immediacy and flexibility of content. The more liquid your community's content, the easier it is for residents and businesses to access this information in ways and via the channels of their choice: fixed or mobile, interactive and live. Revize is able to effectively make your content liquid. This will make it adaptable to various situations and, therefore, easy to reuse in different contexts distributed for a variety of display formats and communication channels.

#3 Image Tiles – This is a trend that enables developers to display content in a pin board style of display. Revize now offers this feature, which creates a visually appealing display of content, such as pictures or social streams. Image tiles also help promote engagement by encouraging visitors to reply to items directly. This is an especially useful option for web pages promoting tourism.

#4 Parallax Scrolling – This is a highly advanced, innovative design technique for sophisticated websites. Parallax Scrolling allows Revize to build websites in multiple layers, with content that moves across the screen at different speeds as visitors scroll. This unique design technique is very visually engaging and can help improve time-on-site metrics.

#5 Innovative Typography – This plays a very important role in website design, image and branding, and is especially important for maximizing the look and feel of the website when accessing it from mobile devices. Our designers are experts in effective typography and take many factors into consideration when selecting the type of fonts, font sizes, and colors to be used for a website.

#6 Social Feeds – With the proven ability to strengthen and deepen interpersonal connections, social networks present a wonderful opportunity for government organizations to increase community engagement and make governments more accessible to the people they serve. One method already mentioned for improving social activity is using pin boards; another is creating a social area or social wall that combines activity from multiple social networks..

Key Phase Objectives & Deliverables:

The following steps are followed while designing new sites

- **Establish Needs and Creative Direction: Understand your objectives and requirements, and provide recommendations for effective online branding pertinent to your** requirements, existing branding and your web audience's needs. The Revize designer will also conduct his own research in order to capture the character and "feel" of your area, which will inspire ideas for the overall design direction of the website.

- **Main Menu Navigation & Home Page Wireframes**: Work with you to establish a main-level navigational architecture and identify key items accessible from your home page. This establishes a baseline for the navigational structure, as well as the preferred content structure (wireframe*) for the home page.

Please Note:
The home page "wireframe" will simply serve as a realistic guideline in terms of content placement, but will not include the final text nor final imagery for this phase. Please see a sample wireframe to concept development snapshot in the next page.

Did you know?
Revize will provide a 100% from scratch design with a satisfaction guarantee!

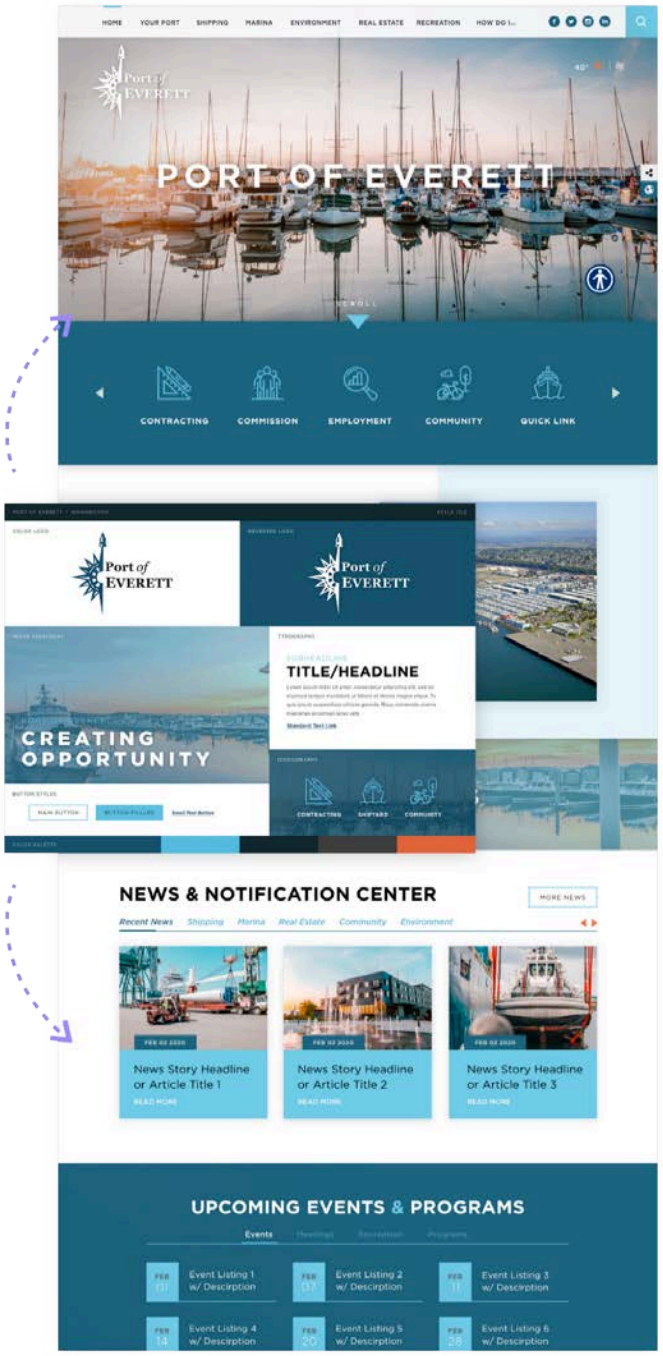
- **Page Layout and module placement**: We will follow all the best practices to layout the different features and modules so that they can be easily accessed by your residents. For example, on the home page there will be sliding picture gallery and quick link buttons for Notify Me, Report a Concern, Document Center, FAQs etc. Also the news and announcements module and events calendar would be integrated into the website, along with the Social Media Center.

Wire Frame to Concept

- **Design Deliverable:** The design concepts for this phase will be based on one or possibly two home page layouts. The client will review and provide design feedback to the designer for changes. Revize asks that clients have no more than three iterations of changes up to the point that the final concept is approved.

- **Final Home Page Sign Off:** When all changes have been made, Revize will present your final home page design and layout for approval. Customer approval is required to proceed to the next phase, the inner pages of the website, and the process repeats itself before the actual HTML & CSS is written.

- **Final Inner Page Sign Off:** When all changes have been made, Revize will present your final inner page designs and layouts for approval. Customer approval is required to proceed to the next phase, when the actual HTML & CSS is written.



Phase 3A: Development

Using the Revize platform, the Revize development team will implement the approved designs directly within the revize CMS as fully functional, production-ready web pages. Pages are built using responsive HTML and CSS and integrated with Revize's dynamic components and structured modules so content can be edited and maintained natively within the CMS from day one.

All included functionality, including calendars, document centers, photo galleries, alerts, eNotify subscriptions, and other revize tools will be configured, tested, and enabled as part of a unified development phase. This approach ensures consistent styling, accessibility compliance, responsive behavior across devices, and seamless integration with revize's page builder and content management workflows.

Phase 3B: Sitemap Development

During this phase, Revize will develop a recommended sitemap outlining page structure, page names, navigation placement, and content locations for the new website. The sitemap may include notes regarding how existing content should be migrated, consolidated, archived, or excluded from migration to support usability and accessibility best practices. The client will have the opportunity to review the proposed sitemap, provide feedback, collaborate with Revize on revisions, and request changes as needed. Final sitemap approval is required before content migration activities begin in a later phase.

Phase 4: Content Migration

Revize will develop all of the pages for your site to make the initial content available upon site deployment. Our content development and migration experts use the latest standard formatting practices to develop the navigation and create the most effective content possible for your website. This includes spelling and style corrections into the new website.

There is no limit to the number of pages you can create after CMS editor training.

Revize will implement an effective website architecture with the latest technology and usability trends so your website visitors can find information in an instant. We will also assess your current website content and incorporate what you currently have with additional content to maximize interest and excitement for your readers. Our content experts are educated in proper writing and terminology, and will use correct grammar, spelling and punctuation.

Our web designers use creative typography which makes the website more visually appealing and also plays a role in defining the hierarchy of content to be placed on the web page. Variations in size and color are used, as well as strategic placement on the page to highlight certain site areas so the visitors can easily navigate the site. Effective typography also ensures that your website will look good on desktop, laptop, mobile and tablet devices.

Phase 5: Quality Assurance Testing & Custom Functionality

Quality Assurance Testing

During this phase, Revize conducts comprehensive quality assurance testing to verify that all pages align with the approved sitemap, structure, and content plan. Any issues identified are documented and addressed prior to website launch.

As the project progresses and the client is trained on the CMS in later phases, quality assurance becomes a collaborative, all-hands effort, allowing refinements and adjustments to continue through go-live within the agreed project scope to ensure accuracy and consistency.

This phase may overlap later phases and can extend beyond go live if required.

Custom Functionality

During the discovery process, Revize works with the client to identify any required custom features, enhancements, or modifications to existing functionality and outlines an agreed-upon plan for execution. In this phase, for projects that include approved custom functionality, Revize begins implementing and testing those customizations to ensure they integrate properly and function as intended. Depending on project needs, some customizations may continue through go-live, supporting a flexible and iterative approach that encourages innovation while maintaining project momentum.

Phase 6: Training and Go Live

Training Your Staff (in-person or web-based training)

Once the website is ready for client editing, authorized users will be able to update and revise content as needed using the Revize CMS. Revize will provide structured training on both administrative and content editor functions, enabling staff to confidently manage pages, documents, images, and other site features. Training is typically conducted virtually to maximize flexibility and attendance, though in-person training may be provided upon request.

Training materials are shared in advance to help participants prepare. With client approval, training sessions may be recorded for future reference. As the site approaches launch, Revize works closely with the client to support final adjustments and ensure readiness for go-live. Following launch, Revize's responsive support team remains available to answer questions, provide guidance, and offer refresher training as needed to support long-term success.

Standard Training Agendas

Basic Administrator Training (How to)

- Sign-in
- Create users
- Assign roles
- Set page level permissions
- Set section level permissions
- Configure and set up workflow approval process

Content Editor Training (How to)

- Sign-in
- Edit page content
- Copy/paste content or add new
- Create a file link
- Create a link to another web page or external web site
- Create a new page and link to it
- Insert/update a picture
- Insert/update a table
- Spell check
- Save and Save as Draft
- History of the page content (content archive)
- Create a survey form or any other type of online web form
- Create navigation pages (top/left menus)
- Create new calendar and create/edit calendar events
- Edit metadata

Advanced Administrator Training (How to)

- Run back-end reports
- Run Google Analytics reports

Training on use of specific Modules included, such as

- Emergency Notification Center
- Public Service Request App
- Web Calendar
- E-Notify
- Quick Links
- Document Center
- Form Center
- News Center
- Frequently Asked Questions
- Bid Posting Center
- Job Posting Application
- RSS
- And more….

Revize Maintenance Covers

- 4 CMS upgrades per year
- Software and modules upgrades (Automatic Install)
- Server Hardware & OS upgrades
- Immediate bug fixes/patches
- Round the clock server monitoring
- Data Center network upgrades
- Security and antivirus software upgrades
- Firewall and router upgrades
- Bandwidth and network infrastructure upgrades
- Remote backup of all website assets
- Cloud backup of all website assets
- Quarterly newsletters on major feature updates
- Regular Webinars on CMS features and usage

Final Phase: You Go Live!

At last, your website content is complete and your staff is sufficiently trained! The final phase in the process is to redirect your website domain name from your old site to your beautiful new one. Once this is completed, Revize will closely monitor the transfer for the first 24 hours to ensure that everything is working properly. Any issues that arise will be immediately resolved.

Marketing & Ongoing Consultation

Revize seizes on every effort to make our clients' sites highly visible. We draft press releases for posting on our website and for distribution locally, and will continuously monitor your site after it goes live so that you can take advantage of all marketing opportunities. We also look to submit your site for different awards and recognition competitions to further maximize your site's exposure.

Search Engine Registration and Marketing

Revize will input all the targeted keywords to make your web pages search engine friendly, thus enabling users to find targeted information when they do a Google, Yahoo or any other search on your site.

Revize Project Team

Revize understands the importance of having a talented and experienced staff. We are proud of our well-respected team of top notch experts in the field of government website design, development, analysis, content management, training and support. From the first creative concepts through to the design phases, and from site launch to training of personnel and continued support of your website project, we have the right group of seasoned professionals to work with you through the website process and beyond. We are pleased to introduce them:

- **Thomas Jean:** Program Manager
- **Alison Bieber:** Project Manager
- **Alex Parent:** Creative Arts Director/Web Designer
- **Samir Alley:** Chief Operations Officer
- **Denise Brazier:** Revize CMS Trainer
- **Jamie Phy:** Revize CMS Integrator/Backend Developer
- **Richard Opiniano:** HTML Developer
- **Joseph Nagrant:** VP Sales/Marketing
- **Derek Ortiz:** Chief Technology Officer
- **Akshaya Ray:** Chief Cloud Architect
- **Many More!**

Thomas Jean – Program Manager

As a program manager, Thomas has managed many award-winning website projects for our clients, including Des Moines, IA – Arcadia, CA – Largo, FL – Golden, CO – Pasco County, FL – Oswego County, NY – Dupage County, IL - Eagle County, CO - Kentwood, MI! Thomas has brought to Revize a very special skill set. Not only does he manage some of our highest priority projects, he is also a genuine subject matter expert when it comes to the inner workings of government. As a former Township Trustee in a Michigan Township, he knows the advantages that come with modernizing the way government does business. With his unique background and education from one of the nation's top universities, Thomas is uniquely experienced to give an honest and accurate assessment of your community's website needs.

- **Philosophy:** Learn as much as possible about our clients and use that knowledge to help build an amazing website.
- **Education:** BA degree in Political Science from University of Michigan;
- **Expertise:** Government procedure, special projects, public affairs, community development.
- **Role on your website project:** Project Manager

Alison Bieber – Project Manager

Alison possesses an innate passion for innovation. Following a decade immersed in the Opera world, she shifted her focus towards entrepreneurship and technology. Playing a pivotal role in establishing the foundations of various initiatives within the non-profit and small business sectors, Alison brings a diverse and proven track record to the table.

- **Philosophy:** "Quality is not an act, it is a habit." - Aristotle
- **Education:** M.A. in Applied Linguistics with a concentration in Foreign Language Pedagogy, University of Massachusetts; B.M. in Vocal Performance, Boston Conservatory at Berklee.
- **Expertise:** Pedagogy, management, communication
- **Role on your website project:** Project Manager

Ray Akshaya – Chief Cloud Architect

Ray has 20+ years of extensive technical experience with internet and website solutions. He has worked on hundreds of government, non-profit and educational websites and has a keen eye for web visitor requirements, information architecture, and usability. He is also a long-time veteran of Revize Software Systems and our clients enjoy working with him. In his career, he has deployed and/or assisted with technical solutions for more than 500 websites. When working on a project, Ray always visualizes himself in the client's chair at the closing stages of the project and makes sure that all decisions made on a project are in alignment with the client's vision and best practices for developing the system.

- **Philosophy:** "Work Hard, Help People and Live Honest."
- **Education:** MS in Engineering Science, Louisiana State University, Baton Rouge
- **Expertise:** Client Management, Project Management, Technology Development for CMS & Web Apps
- **Role on your website project:** Chief Cloud Architect

Denise Brazier – Lead Trainer

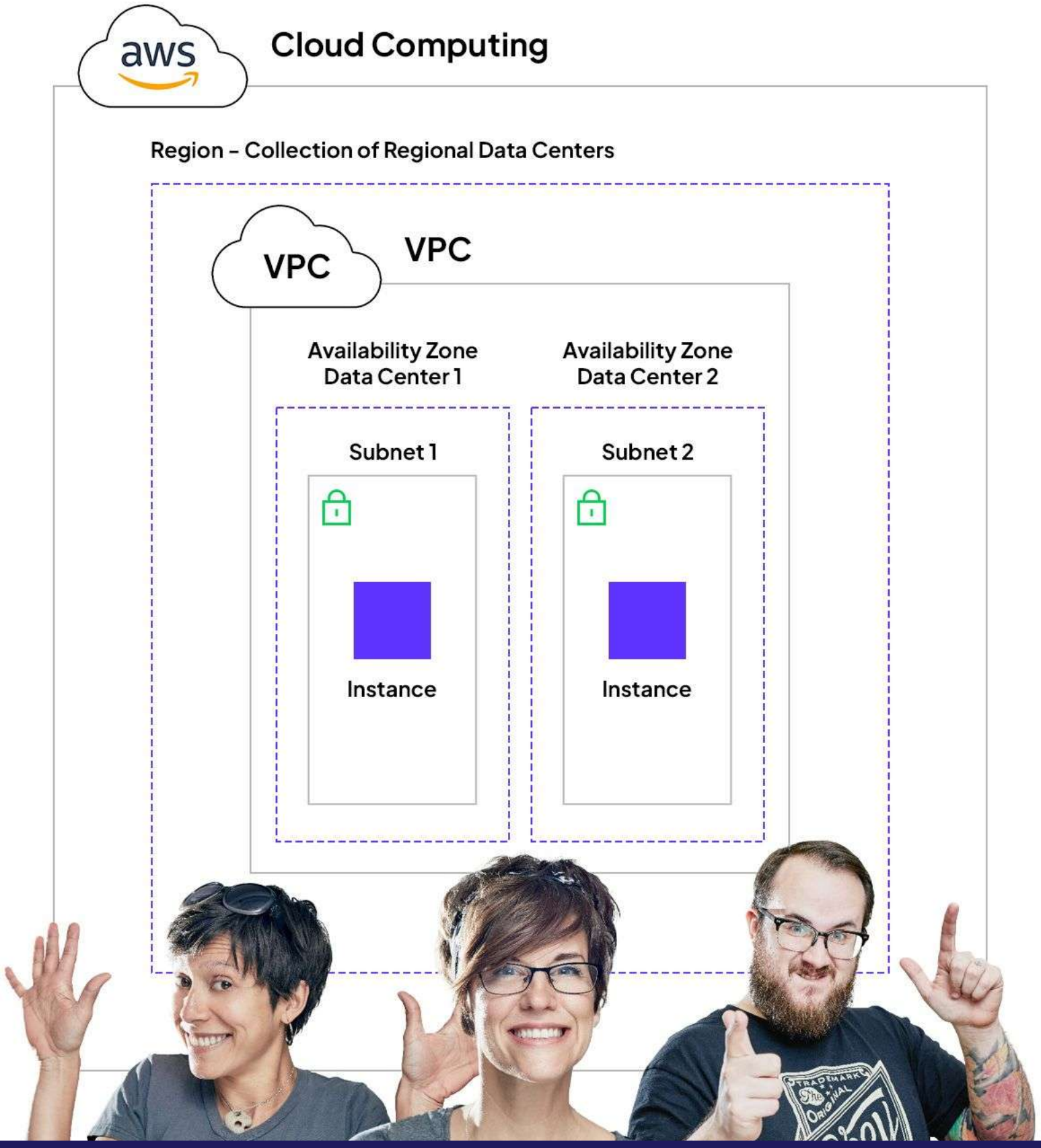
Denise is an educator by nature. Her 20 years of experience in the public school system has made her a master of engaging participants during training. She effortlessly builds effective relationships with all clients. Denise has served as Advisory Counselor, Coordinator, Publicity Director, and Project Manager for several organizations in the education, non-profit and public sectors. She has been appointed to the state's quality committee evaluating organizational policies and procedures for recognition.

- **Philosophy:** "Always explain things in the terms of your audience to ensure their understanding"
- **Education & Training:** MS in the Art of Education from Marygrove College. Certification in Secondary Education
- **Expertise:** Training, education, teaching, public affairs and project management.
- **Role on your website project:** Trainer for the Content Management toolset

Samir Alley – Chief Operations Officer

Samir brings more than a decade of experience leading municipal website design and development initiatives and has been directly involved in designing or deploying hundreds of government websites nationwide. Formerly with our creative driector and lead web designer, Samir now serves as Revize's Chief Operating Officer, where he applies his deep design, technical, and operational expertise to continuously improve the Revize platform, project delivery process, and overall client experience. His strong communication skills and ability to anticipate client needs help drive thoughtful innovation across the organization, ensuring Revize products and services remain efficient, intuitive, and aligned with evolving industry standards.

Cloud Hosting, Disaster Recovery, & Security



Resilient Hosting:

Revize uses Amazon Web Services (AWS) Hosting Infrastructure that is offered in multiple Regions in the United States and around the World. Each Region is a separate geographic area completely isolated one from another. AWS Regions are connected to multiple Internet Service Providers (ISPs) and to a private global network backbone to offer lower cost and more consistent cross-region network latency when compared with the public internet.

A region has multiple, isolated locations known as Availability Zones (AZ). Availability Zones are inter-connected through low-latency links. A Virtual Private Center (VPC) spans across multiple availability zones.

Revize Web Sites are hosted on a Virtual Machine running Windows Server operating system with Internet Information Service (IIS) as a Web Server. Virtual Machine is an EC2 instance in AWS terms is hosted inside a VPC in an availability zone of a pre-selected region. A number of EC2 are provisioned in multiple locations across the United States inside a Virtual Private Center isolated from the Internet and the rest of Amazon Web Services infrastructure to offer faster access to the end-users and to minimize the impact of an outage, whether of a specific EC2 instance, an availability zone or an entire AWS region.

Disaster Recovery:

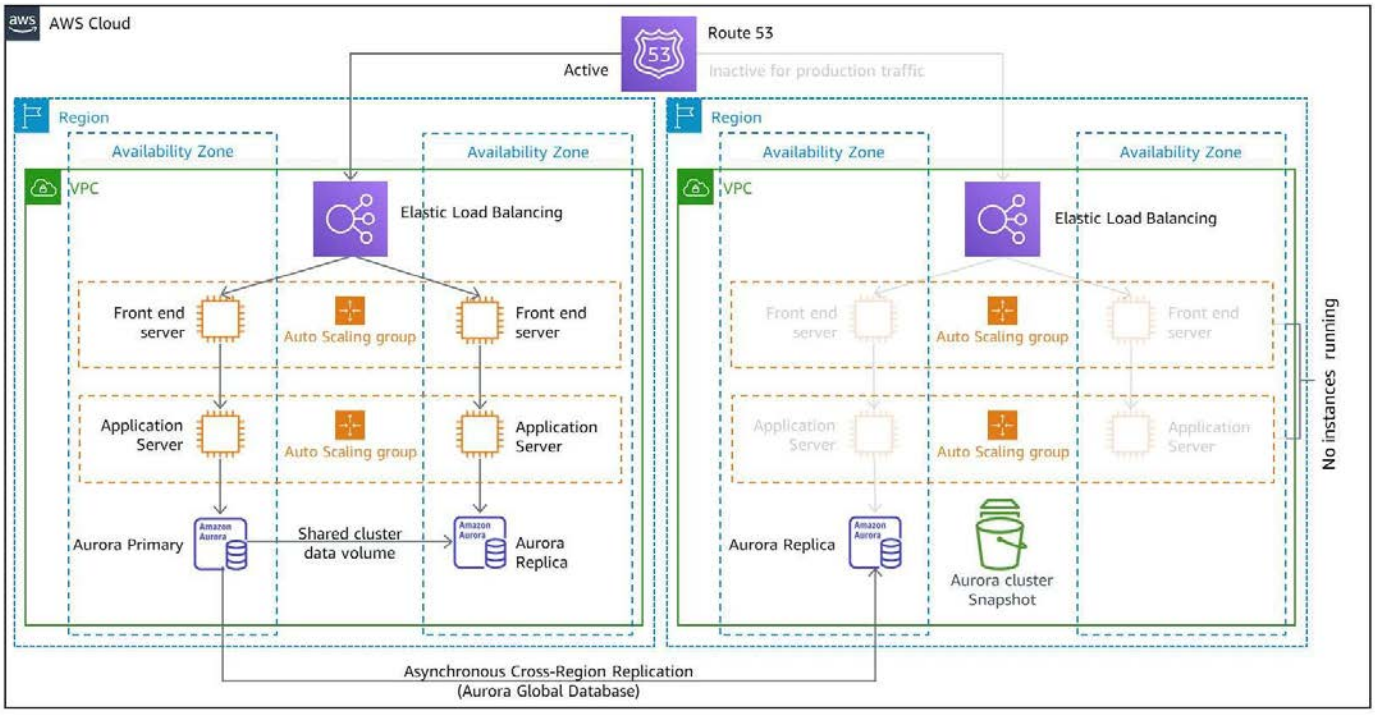
Windows Web Server virtual disk or EC2 Elastic Block Storage (EBS) is backed up on evry night at 10 PM EST. Additionally, the snapshots or virtual disk backups are subsequently automatically copied between regions to enable cross-region recovery capabilities.

Should a Web Site hosted by Revize and monitored in automated fashion become unavailable, another EC2 instance can be restarted. When that proves insufficient EC2 instance will be reprovisioned in the same availability zone, a different availability zone, or, in a different region using the latest snapshot in the matter of a couple of minutes.

The incoming request, from the Internet traffic, is bound to a static IP address or Elastic IP in AWS terms that leverages NAT to forward traffic to a running EC2 instance private IP address. In the case of an EC2 instance re-provisioned in the same region, whether in the same or a different availability zone, Elastic IP is re-assigned to the new EC2 instance.

Elastic IP is represented to the public internet using CName or A-Host domain name services entry. In case of an EC2 instance or an availability zone failure, no adjustment to domain name service is required. In the case of a regional, wide-spread AWS outage, an EC2 instance is reprovisioned in a different region, re-using the latest snapshot preserving the content as of the last automated backup. However, an Elastic IP is specific to the region and, therefore a change to CName or A-Host configuration is required to point to the disaster recovery regional Elastic IP.

Revize Disaster Recovery Infrastructure Diagram



Security

Revize takes website security very seriously and we provide our clients with the very best website protection protocols. Our data centers are located on secure premises equipped with card-reader access, security cameras and guards on duty 24/7 to ensure the physical protection from unauthorized entry.

Revize/AWS complies with SOC 1/ISAE 3402, SOC 2, SOC 3, FISMA, DIACAP, and FedRAMP, PCI DSS Level 1, ISO 9001, ISO 27001, ISO 27017, ISO 27018 and other programs. Revize is responsible for securing the content, access to the content on the web server, to snapshots, configurations and infrastructure as a whole.

Our web and network administrators monitor network activity 24–hours-a-day to ensure system integrity and protection against threats such as Denial of Service (DoS) attacks that could corrupt your website or block user access. Maintaining the secure configuration of our web servers is managed through application of appropriate patches and upgrades, security testing, vulnerability scans, monitoring of logs, and backups of data and OS.

Security Controls, SSL, and Active Directory (LDAP)

- Anti-malware software such as antivirus software, anti-spyware software, and rootkit detectors
- Shield Plus Security Bundle to prevent DDoS attacks
- Intrusion detection and prevention software (such as file integrity checking software)
- Host-based firewalls to protect CMS servers from unauthorized access
- Patch management software
- Security and Authentication Gateways
- Content filters, which can monitor traffic to and from the web server for potentially sensitive or inappropriate data and take action as necessary
- HTTPS (Hypertext Transfer Protocol over SSL), which provides encryption and decryption for user page requests that require more secure online transactions
- SSL (Secure Socket Layer) provides an encrypted end-to-end data path between a client and a server regardless of platform or OS
- If you have an existing SSL Certificate we can transfer it to the new website. Otherwise, if included, we will install a new SSL Certificate upon go live.
- Active Directory (LDAP) is compatable with the Revize CMS. It can be set up in a variety of configurations. As part of the process we will work with you to determine which configuration will best meet your needs.

Application Security Authentication

- Role-Based Security: Role-based authentication to add individual user accounts and assign them system roles like Editor, Developer, Administrator, Workflow Approvers, etc., or department roles and empower the department to assign specific roles to users.
- Permission-Based Security: Ability to set up Content Owners/Editors and restrict which site pages they are authorized to update
- Global & Department Workflow Management: Create workflow management and approval processes where authorized department personnel become approvers

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Did you know?
Revize will host your website and CMS in at least two completely separate geographic locations!

Maximum Response Times

- 1 hour for crisis issues
- 4–6 hours for critical issues
- 24 hours for normal issues

Revize Support

- 8 a.m. – 8 p.m. EST Phone Support (Monday thru Friday)
- 24/7/365 Portal & Email Support
- Dedicated support staff to provide assistance and answer all questions
- New and existing user training
- Training refreshers
- Video tutorials and online training manual
- Automatic integration of enhancements
- E-Newsletter module support
- Automatic upgrades of CMS Modules such as Calendar, Document Center, etc…

Software Maintenance

Revize rolls out two new versions of the Revize CMS, and six to eight product updates every year. The Revize CMS is continuously enhanced to keep pace with cutting edge technologies and industry trends. When a software update or new version is rolled out, Revize will automatically update all servers used by our subscription service clients.

“As a Revize client, you will receive full access to all enhancements to the core components and modules in the Revize CMS at no additional charge.”



Revize AI ChatBot

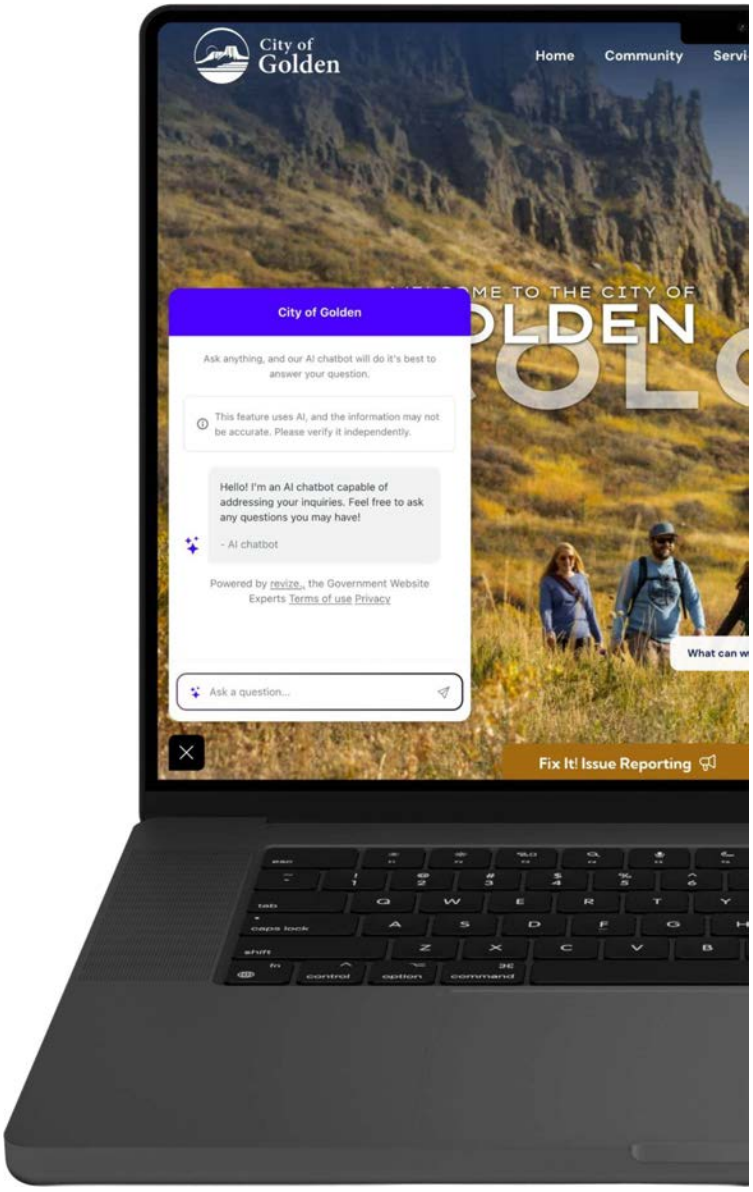
As part of Revize's fully integrated lineup of features, we are excited to introduce the latest in AI Chat technology.

The Revize ChatBot allows your visitors to instantly find answers to their questions – without the need to search, find, and read an entire webpage.

Users simply type in their question, and the Revize ChatBot provides a detailed response in seconds!

Unlike some third-party live chats that force admins to pre-populate content, the Revize ChatBot is quite different. It learns the content of your website and provides answers based on that content.

Admins can even configure the ChatBot to ignore certain content of your website and learn content of other websites.



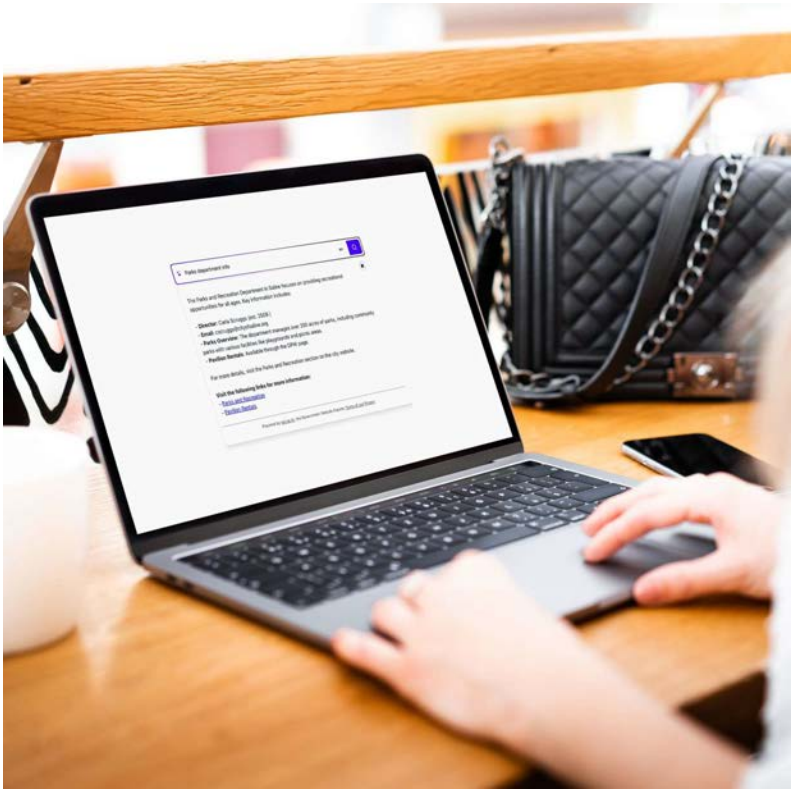
Keep in mind, Revize developed this feature ourselves. Which means the maintenance, updates, tech support are all handled directly by Revize. No need to deal with another vendor.

Revize AI Search

A better search experience driven by AI

The Revize AI Search tool improves on traditional tools like Google/Bing by using natural language processing to deliver direct answers and personalized results, creating a faster, more intuitive user experience.

Smarter Search



Understands Conversational Messages

- Uses Natural Language Processing to provide context-based answers

Direct and Informed Answers

- Provides clear, concise responses instead of a long list of links

Self-Teaching

- No Setup Needed; our AI scans your full website and tracks new content

Personalized Results

Customized Recommendations

- Suggests content based on individual preferences and needs

Conversational Intelligence

- Gets smarter with each search, fine-tuning answers for better accuracy

Faster Search Experience

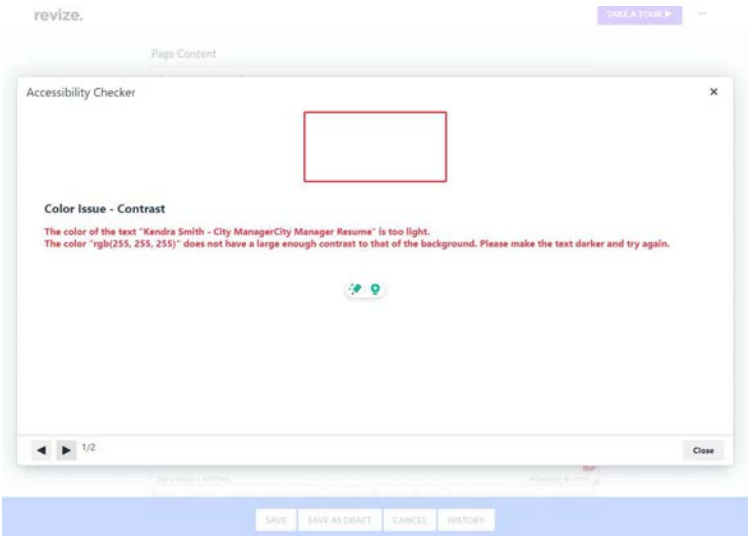
- Delivers tailored results by removing clutter to show relevant information

Accessibility & Compliance

WCAG 2.1 & 2.2 Accessibility Compliance

Revize has launched more than 3,000 websites nationwide, with accessibility incorporated into both our platform and implementation process. Revize websites are designed to align with WCAG 2.1 AA, while actively incorporating WCAG 2.2 AA best practices as standards evolve using current industry-recognized approaches.

The Revize CMS includes built-in accessibility checking tools to help identify potential issues as content is added or updated. Together, these tools and practices support an ongoing, collaborative approach to accessibility between Revize and our clients.



Accessibility Strategy – During the Project

Revize will:

- Design custom visual mockups with WCAG 2.2 AA considerations in mind, including color contrast, typography, layout structure, and interactive elements.
- Build the site using ARIA labels, semantic HTML, and other WCAG best practices.
- Ensure keyboard navigability and screen reader compatibility.
- Include an accessibility checker in the Revize CMS editor.

While Revize provides the framework for compliance, the CLIENT is responsible for ensuring that content (e.g., PDFs, documents, images) is accessible before posting. Revize does offer PDF remediation services as an add-on for files that need to be made compliant.

Accessibility Strategy – After Go Live – WCAG Scan & Remediation Service

One of the elephants in the room when it comes to WCAG compliance as it relates to government websites – “Who will be fixing any future compliance issues with our website after go-live?”

Good news, Revize can take on that task for you. As an **optional service**, Revize can include our WCAG remediation service.

Accessibility compliance is an ongoing process, not a one-time task. To support long-term compliance, Revize offers an **optional WCAG Remediation Service** that includes:

- Two or four full-site scans per year to identify new accessibility issues.
- Detailed accessibility reports for staff awareness and recordkeeping.
- Up to 20 hours annually from a WCAG remediation specialist to resolve flagged issues.

This service provides ongoing monitoring and hands-on support so the website remains as accessible and compliant as possible long after launch.

RZ Assist – Website Accessibility Widget and Scan Tool

RZ Assist is an accessibility enhancement tool built specifically for government websites and public sector use. It provides a comprehensive set of user-controlled features that help residents access online content more easily, including visual adjustments, reading aids, and enhanced navigation tools. These features empower users to tailor their browsing experience to their individual needs, improving overall usability and inclusivity.

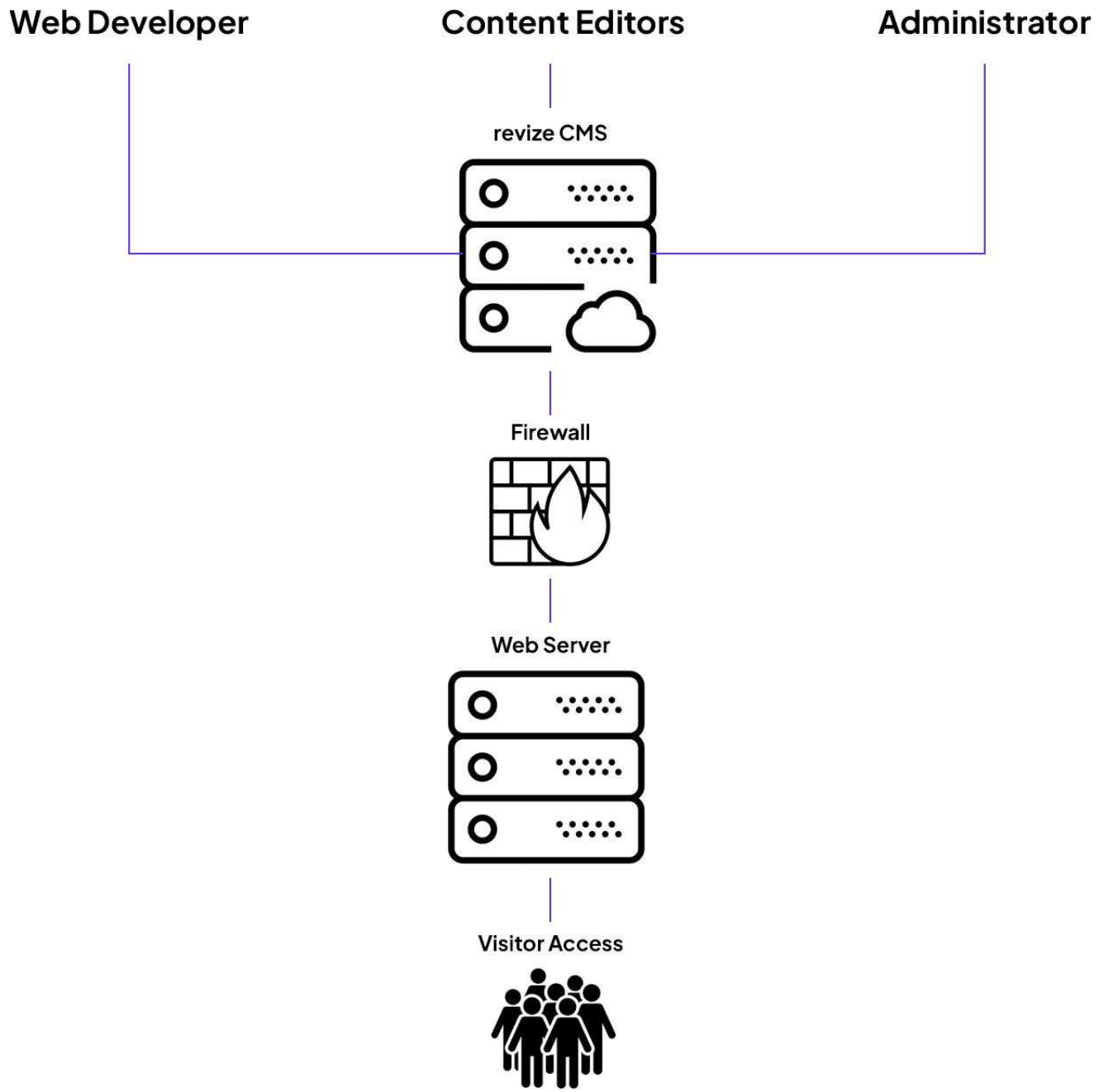
In addition to front-end user controls, RZ Assist Pro Plus includes a built-in site scanning tool paired with a secure backend dashboard. This tool regularly scans the website for suspected accessibility issues and flags potential areas of concern, such as missing alternative text, contrast challenges, or structural inconsistencies. The accompanying dashboard allows staff to review findings in a centralized interface, prioritize issues, and track remediation efforts over time.

RZ Assist Pro Plus is designed to integrate seamlessly with existing websites and does not require changes to current content publishing workflows. Rather than replacing proper accessible design and development practices, it functions as a practical support layer within a broader accessibility strategy, helping municipalities proactively monitor accessibility, improve transparency, and continuously enhance the digital experience for all users.

Revize Technology Architecture

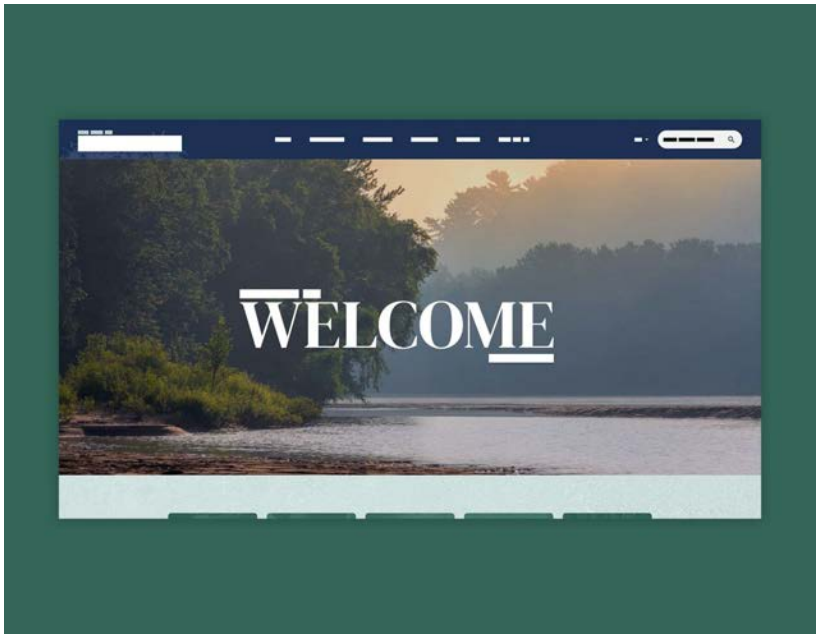
The Revize Government CMS is a standards-based, open architecture software product without any proprietary restrictions. Revize uses leading technologies to avoid integration problems with existing systems and comes complete with its own Integrated Publishing Engine, Embedded Relational DB, JSP/Servlet Engine, and Application Server.

Revize Intelligent Publishing WCM



Revize Government CMS User Interface

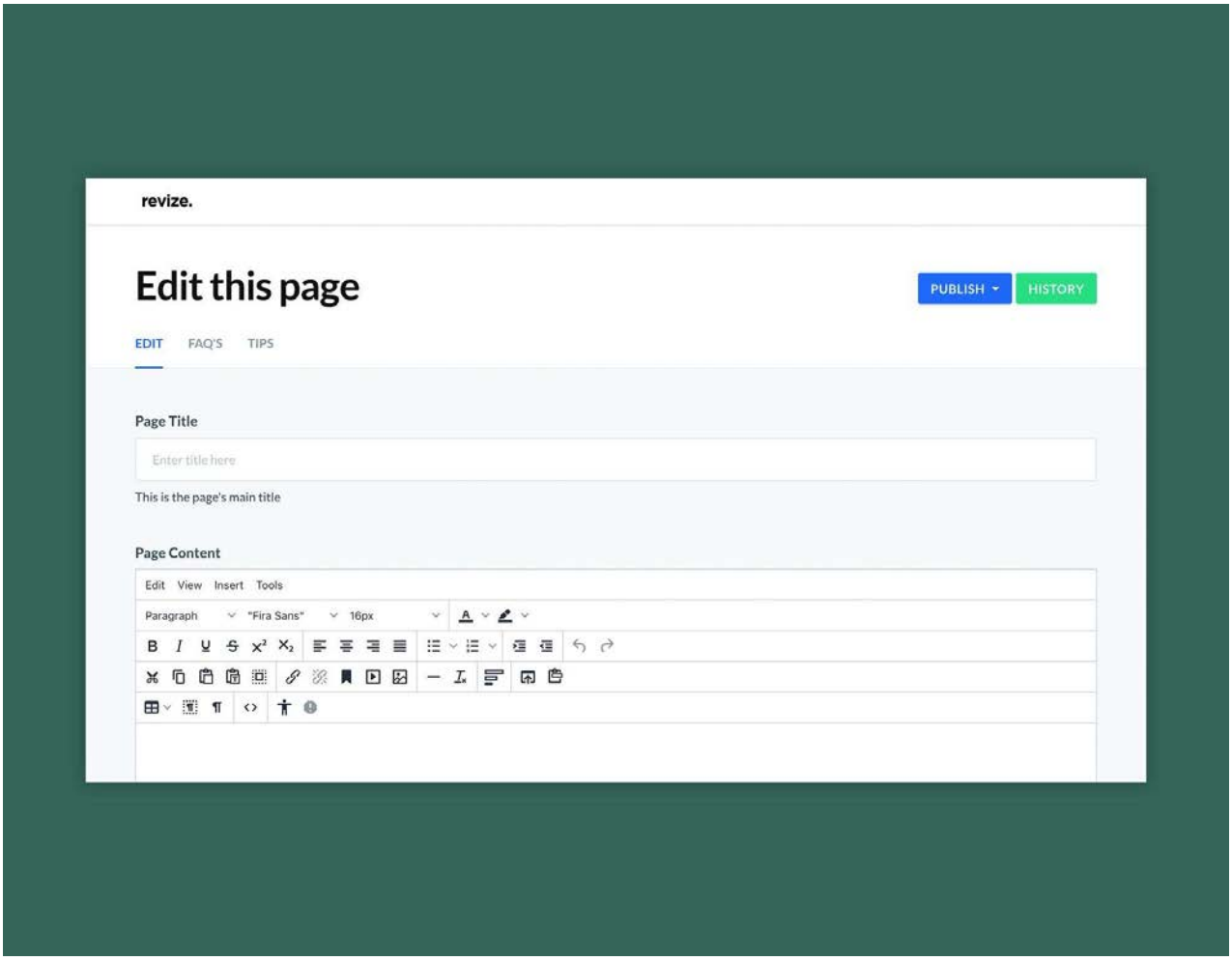
1. Revize CMS User Interface Home Page



2. Users simply browse to a page that they want to edit, select the Login button, and login with their user credentials. Edit buttons appear on the page after the Login executes. Based on users roles/permissions, the appropriate buttons are displayed.



3.The input form appears as shown below. Content Editors can change banner, page heading and the content displayed in the center of the page. Notice the content is changed using a “Word Like” editor.



After the page is “saved”, the page can be sent to an approver for review or immediately published to the web site.

Itemized Fees

Project Cost

	Total
Phase 1: Kickoff Meeting and Discovery/Project Planning	**$2,500.00**
Phase 2: Design Mockups/Wireframes One (1) concept, three (3) rounds of changes for each of the following - Homepage & Inner Page	**$5,500.00**
Phase 3A & 3B: Development & Sitemap Development Convert mockups into Revize CMS enabled webpages and provide suggested sitemap	**$9,300.00**
Phase 4: Quality Assurance Testing & Custom Development	**$3,900.00**
Phase 5: Content Migration Content migration according to previously approved sitemap – Up to 400 webpages and 1,200 documents	**$5,700.00**
Phase 6: Revize CMS Content Editor Training & Go Live	**$2,900.00**

Total Project Cost $29,800.00

Annual Fee

	Total
Annual Tech Support, Revize CMS License and Hosting Fee: Unlimited tech support, Unlimited CMS users, up to 30GB website storage, 100GB monthly bandwidth	**$7,900.00**
Revize AI ChatBot and AI Search (Optional):	**$3,400.00**

Optional Add-Ons

Additional Features/Services

	Total
Annual WCAG Scan and Remediation Service (Annual Fee): Includes up to 2 scans per year with up to 10 remediation hours included	$3,000.00
RZ Assist Pro Plus - Accessibility Widget & Sitewide Scan Tool (Annual Fee)	$2,400.00
RZ ClearDocs (PDF to HTML Accessible Converter) - Annual Fee Automatically converts PDFs to an Accessible HTML version sitewide	$4,950.00
Revize Email Newsletter (Annual Fee) Up to 50,000 monthly sends	$2,900.00
Mobile App (Initial Investment) $3,400 Annual Fee Due Upon Go Live	$6,500.00
Logo Design Includes 3 concepts. Client picks one for up to 3 rounds of revisions	$5,500.00

Optional Payment Plan – The Revize Client First Plan

The Revize Client First Plan offers local governments an alternative payment plan that makes it easier to purchase a new website on your budget and spreads the one-time project design and development costs over a longer period of time.

Through a minimum three-year contract, The Revize Client First Plan dramatically lowers the one-time project development and start-up costs of launching a new website. What Revize does is combine the one-time and recurring fees and spreading them over the life of the contract. And because we value our continuing relationships with our customers, those who extend their contract beyond the three-year minimum will receive a redesign at the end of their fourth year with Revize Free of Charge.

Optional Payment Plan – Three Year Payment Breakdown – Interest Free

Year 1	**1/3rd of project costs + Annual Hosting, Support, Maintenance**
Year 2	**1/3rd of project costs + Annual Hosting, Support, Maintenance**
Year 3	**1/3rd of project costs + Annual Hosting, Support, Maintenance**
Year 4	**Annual Hosting, Support, Maintenance (Optional) Includes Free Redesign**

Included Features

The Following Applications & Features will be integrated into Your Website:
In addition to the Government Content Management System, which allows non-technical staff to easily create and update website content, Revize includes a suite of applications and features purpose-built for municipalities. These tools are outlined below and organized into five categories.

Citizen's Communication Center Apps

- Notification Center with Text/Email Alerts
- Bid Posting
- Document Center
- E-Notify with Text/Email Alert
- FAQs
- Job Posting
- Multi-use Business Directory
- News Center with Facebook/Twitter Integration
- Online Forms
- Photo Gallery
- Quick Link Buttons
- Revize Web Calendar
- "Share This" Social Media Flyout App

Citizen's Engagement Center Apps

- AI ChatBot & Search
- Citizen Connect (Community Blog)
- Citizen Request Center with Captcha
- Curated "Smart" Search
- Online Bill Pay
- Online Interactive Forms with Bookables (Public Records Request App)
- Public Service Request System
- RSS Feed

Staff Productivity Apps

- Agenda Posting Center
- iCal Integration
- File/Image Manager
- Intranet
- Job Posting App
- Link Checker
- Menu Manager
- Online Form Builder
- Staff Directory
- Website Content Archiving
- Website Content Scheduling

Site Administration and Security Features

- Audit Trail
- Auto Site Map Generator
- History Log
- Secure Site Gateway
- Unique Login/Password for each Editor
- URL Redirect Setup
- User Roles and Permissions
- Web Statistics and Analytics
- Workflows by Department

Mobile Device and Accessibility Features

- Alt-Tags
- Font Size Adjustment
- Language Translator
- Mobile and Tablet Preview while Editing
- Responsive Website Design (RWD)
- WCAG Accessibility

Revize Support Includes

- 8 AM – 8PM EST Phone Support (Monday thru Friday)
- 24/7/365 Portal and Email Support
- Staff provides assistance and answers all questions
- Dedicated support staff
- New/existing user training
- Free Training Refreshers
- Video tutorials and online training manual
- Automatic integration of enhancements
- E-Newsletter Module support
- Automatic upgrade of CMS modules, such as Calendar, Document Center, etc.
- Four major CMS upgrades per year
- Software and modules upgrades (automatic install)
- Server hardware and OS upgrades
- Immediate bug fixes/patches
- Round the clock server monitoring
- Data Center Network upgrades
- Security and antivirus software upgrades
- Firewall and router upgrades
- Bandwidth and network infrastructure upgrades
- Remote backup of all website assets
- Cloud backup of all website assets
- Quarterly Newsletters on major feature updates
- Regular webinars on CMS features and usage



Did you know?
Revize updates your Content Management System an average of 4 times per year!

Citizen's Communication Center Apps

Document Center App



With the Document Center App, Revize helps clients save countless hours of employee time and resources. Using this module, you can create and archive the documents your site visitors require, like applications, brochures, manuals, policy and data sheets, research papers, meeting minutes, and more. By providing all of your documents online, your site visitors can access them 24/7 – usually within two clicks -- without incurring printing or postage costs. Skip the hassle and save money with the Revize Document Center.

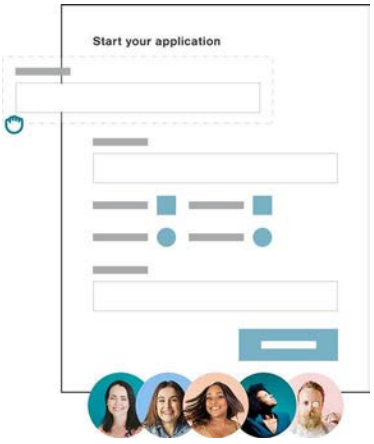


FAQ's

FAQs make it easier than ever for site visitors to find quick answers to common questions, significantly decreasing the number of calls coming into your switchboard daily. Within six weeks of a Revize website launch, our clients typically experience a significant decrease in daily phone calls. Support your community and relieve your employees with the FAQ App.

Job Posting

Revize's Job Posting App enables site visitors to view and apply for open positions virtually. Postings are removed automatically based on the job expiration date entered by HR personnel. Provide as much detail as you need, and link or upload any number of files describing the position. With the form-fill interface, new job openings can be posted in minutes by non-technical staff. Connect employers and employees with the online Job Posting App.





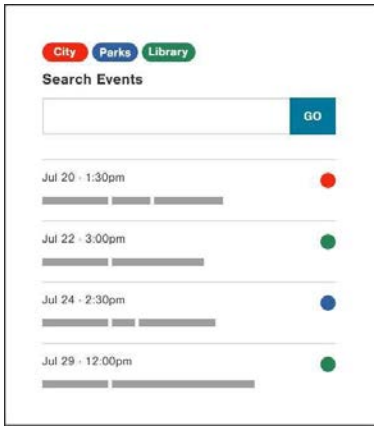
E-notify

The E-Notify App keeps site visitors informed. Web users can receive text and email notifications when a webpage changes. Many of our municipal clients include a notification option on their Meeting Minutes and Meeting Agendas pages so interested citizens can sign up for automatic updates on new postings.

Interactive Map

The user-friendly Revize CMS pairs perfectly with the Revize Interactive Map App, ensuring that the real world is as easily navigable as your website. Buildings, parks, bike paths, mass transit stations, nearby businesses, tourist attractions, parking lots, voter polling locations, and more are incredibly easy to identify with the familiar Google Maps interface highlighted with Pins.





Calendar App

The Master/Sub Calendar is a user-friendly tool that enhances usability and encourages the communication of events both internally and externally. It provides visibility and transparency for activities, meetings, and events with a visually appealing display and easy-to-find event contact information. The Calendar App is customizable to user preferences and boasts a Monthly, Daily, Weekly, or Listing View. Save time with the ability to insert recurring events; a perfect solution for repeating Board and Council meetings.

Notification Center

You can't control Mother Nature. However, you can protect your community from her wrath. By posting emergency notifications on your home page, another webpage, or throughout your site, this module allows your webmaster to accurately explain the situation and instruct members of your community on current protocol. In the wake of a natural disaster, the Notification Center is an essential tool to ensure safety and rehabilitation.

Bid Posting

Make sure your government agency is receiving the best possible vendor options for community projects with the Revize Bid Posting App. It provides a simple and convenient online method for vendors to see what your community is looking for and select the best bid choice for community projects. With options to specify the open and close dates for bid opportunities, our bid posting app makes it easy to automatically post and remove any bid from the website. Keep timelines, dates, and quotes open to the public and stay on top of projects and potential vendors.

Business Directory

Ideal for municipalities, chambers of commerce, or any membership organization, this module allows you to easily create and maintain a searchable directory for members and/or businesses within the website. Listings can easily be added, removed, and categorized by non-technical staff in a simple table interface.

News Center with Facebook Integration

The News Center is the news area on the homepage of your website. Many of our municipal clients include an email/text notification option on their Meeting Minutes and Meeting Agendas pages so interested citizens can sign up for automatic updates anytime there is a new posting. The News Center can integrate with Facebook so that news items are automatically posted to Facebook from the website, making life easier for your webmaster.

Online Interactive Forms

Using the Interactive Forms App, you can create -- from scratch -- an unlimited number of custom online forms on any page of your website. The beauty of the app lies in its simplicity. It enables site visitors to fill out and manage forms online in their browser without having to download or print documents. These forms can be used to have visitors contact you with questions, comments, and requests, give feedback, volunteer, sign up for various events, apply for permits, and so much more. Save your staff time and money by automating manual form processes with Revize Interactive Forms.

Quick Links

The Quick Links module empowers site visitors to navigate to their areas of interest, much like FAQs. Examples for users: “Where do I… Get Registered for Summer Camp.” “Where do I… Get a Marriage License.”

Sharing App

The Revize Sharing App provides a one-click drop-down to multiple social media and utility buttons. A common widget found on the web, it is intuitive and easy to use.

Sliding Feature Bar

This feature enhances the visual appeal of your website. It helps to break up pages with an interesting slide bar that can be populated with any subjects or areas to which you’d like to draw attention. For example, you may want to feature Parks & Rec; Landmarks and Tourist Attractions.

Translator

Revize integrates the Google Translator into your website template and translates from English to over 100 international languages. Provides users a large visual display at the top of the web page to choose any language to convert the text into and enables site visitors of all backgrounds to find the answers they seek. Promote inclusivity in your community with the Translator module.

Citizen's Engagement Center Apps

Public Service Request App

This app allows site visitors to submit requests online based on a map view. Each time an issue is submitted, a staff member will receive an email notification. From there they can respond directly to the requests and users can track their requests to completion. Photo submission, automatic escalation, mobile app integration, and archived reporting make this one of our most powerful features!

Citizen Request Center

The Citizen request Center allows customers, residents, participants, students, or any website visitor to post requests online. By the use of a drop-down menu, individuals can forward the request, idea, or comment to the party of interest. The item is then forwarded via email to the proper recipient. You can add or delete department names as well as individuals in the drop-down menu at any time. Captcha is integrated to ensure each request is genuine and not spam.

Public Records Request Tracker

The Public Records Request Tracker allows the public to order copies of the public records maintained by a municipality. The request is routed to the record custodian within a department and an automated response is generated with a unique tracking number. The system allows the full tracking, correspondence, and online handling of all public record requests. The record request form is flexible and customizable for every municipality.

Citizen Connect

The Citizen Connect App helps open the lines of communication between administrators and their constituency, increasing transparency and interaction. It is a blog that features the option for user feedback comments (comments can be moderated before being published to the website).

Facilities Reservation App

This app allows the display of conference rooms, parks, shelters, and their amenities to manage their availability. A website visitor can search for facilities by type available, review the amenities for each facility, and easily reserve the facility, including the option to pay for its use. Reduce the administrative workload and encourage community engagement with the Facilities Reservation App.

Online Bill Pay

Online Bill Pay enables clients to set up secure online payment processing for credit card transactions using Stripe. This integration can be used for utility and tax payments, purchasing items online, making donations to non-profit organizations, and more.

Rss Feed

The Revize CMS allows customers to generate RSS (Real Simple Syndication) feeds for any genre of news or events. RSS feeds are a trusted way to communicate important information to site visitors while ensuring that they remain engaged with your organization and regularly return to your site.

Staff Productivity Apps

Agenda Builder

With the cutting-edge Agenda Builder app, users can automate the assembly of meeting agendas and minutes, saving your webmasters time for more important tasks. The app allows you to easily create, edit, and manage agendas, adding notes to generate official meeting minutes with a single click. Track user access, assign unique roles for each board or commission, and monitor critical meeting data for future use. Controlled access and permissions ensure secure collaboration. Take control of your time by streamlining your meeting creation and management with the Agenda Builder.

Agenda Posting Center

Using this multifunctional app, you can upload agendas, meeting packets, meeting minutes, and more. All materials will be in one area on your website for easy access and review before, during, or after each meeting. Old meeting agendas and information are archived per meeting for quick access.

Image Manager

The Image Manager allows approved staff to upload images from their computer or network folders. The simple interface helps users upload new pictures and stores the uploaded pictures for reuse. Each department can create unique image folders and organize image libraries by department. Obsolete images can be deleted from the image library.

Intranet

Provides a Dynamic CMS-enabled area with secure login to build out an Intranet for employee-specific information only. It benefits your employees to have an internal organization landing page that can be updated with news, events, alerts, and many of the same modules used on the extranet. Support your employees and ensure their success with the Revize Intranet capabilities.

Link Checker

When a new link is created, the Revize system checks whether the URL (link) is valid. If not, an error message will be displayed. The useful Link Checker benefits the webmaster by double-checking bad links before they are saved and displayed on your website. It provides a second line of defense for your staff.

Menu Manager

The Menu Manager allows approved content editors to add or edit site-wide top navigation, and department or section-specific links (e.g. left or right navigation). This feature gives you control to change and update the Navigation menus of your website for continuous improvement.

Newsletter App

The system empowers non-technical staff to create attractive, informative newsletters and disseminate them with one click to everyone on your distribution list. Activity metrics include displaying bounced and successful emails to help validate email addresses. The application offers the ability to import contact lists, upload images, add groups, assign contact lists to those groups, and export lists.

Online Form Builder

The Online Form Builder provides a quick and easy alternative for users to communicate with you, offer valuable feedback, and complete tasks online. The forms can be used to have site visitors contact you with questions, comments, and requests, give feedback, volunteer, or sign up for various events, activities, and programs.

Web Content Archive

Your website history will never be a mystery, because all content edits for your site are archived on the Revize CMS database for reference and future use. Your webmasters can click the History button to view previous versions of a particular page or content blocked from your site.

Web Content Schedule

The Web Content Schedule feature eliminates the possibility of promoting dated or past events on your site after the event has passed. The guarantee that accurate information is displayed on your website ensures you will never undermine the perceived accuracy and currency of the site's content with your audience.

Audit Trail

This is a crucial administrative tracking tool that provides reports on the content change activities of any webpage within the system. The administrator can gauge how often the site is updated, which departments are most active, and use the audit trail for data recovery, if necessary.

Auto Sitemap Tool

The Revize CMS provides this tool to generate a sitemap automatically. Whenever a new page is added or deleted from the system, the sitemap will republish to adapt the change. An up-to-date sitemap is critical to boost the ranking of your website on different search engines.

History Log

With the History Log, administrators can view all the archived versions of any web page and restore any old or archived page. It is a useful feature for referring to any archived legal documents or press releases.

Roles/Permission Setup

Our CMS uses a role-based authentication system in which you can add individual user accounts. Then, assign system roles like Editor, Developer, Administrator, Workflow Approvers, etc. Or, you can add roles for each department and assign department-specific roles to each user.

Secure Site Gateway

Provides a secure login area for either users of an intranet or users to access information unavailable to the general public. Once users are set-up with a secure login ID, they can manage their password changes as needed.

Website Statistics

Revize integrates Google's Web Analytics tool to track the number of site visits, website traffic sources, and more. Your website administrator can run various reports to collect important data on the usage of your website.

Workflows By Department

Workflows offers a method for Supervisory Oversight of content updates. The process allows an authorized "approver" to compare the current page with the proposed new page content (side-by-side) for easy review and comparison.

Mobile Device and Accessibility Apps

Alt-Tags

Use of alt tags for images, a required part of the Revize CMS image manager feature, allows visually impaired individuals to understand the content of the image. Alt tags are imperative for website accessibility and ADA compliance.

Font Size Adjustment

Provides the ability for users to change font size by clicking a button to reach their desired size. Helps those with impaired vision to easily read information on your website.

Responsive Web Design

Revize uses pixel-rendering Responsive Web Design to accommodate better viewing of text and graphics for any size screen, i.e., smartphones, tablets, iPads, and iPhones. A must-have feature in a world of smartphones.

WCAG Compliance

Revize websites are designed to align with **WCAG 2.1 AA**, while actively incorporating **WCAG 2.2 AA** best practices as standards evolve. Accessibility is supported through ongoing platform enhancements and client tools.



revize.

Thank you

For Considering revize



Prepared by Thomas J. Jean

150 Kirts Blvd. Troy, MI 48084

Ph: 248-269-9263 x8035

Fax: 866-346-8880

www.revize.com

Disclaimer

Scope of Proposal: The information contained in this proposal is for general informational purposes only. The content of this proposal is subject to change without notice, and revize LLC reserves the right to modify, amend, or alter any part of the proposal at its sole discretion. The services, deliverables, timelines, and pricing outlined herein are estimates and are subject to further negotiation and final agreement.

Resolution No. 2026- _____

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING ATTENDANCE TO THE 2026 BIVONA CHILD ADVOCACY CENTER CHILD ABUSE SUMMIT

At the regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member _____offered the following resolution and moved its adoption:

WHEREAS, the Bivona Child Advocacy Center will be hosting the 2026 Child Abuse Summit in Rochester, NY from April 22nd-April 23rd, 2026. This multi-disciplinary training is a must for anyone who works with children to educate law enforcement about collaborative ways to prevent, treat, and investigate child abuse.; and

WHEREAS, an Investigator from the Irondequoit Police Department would like to take advantage of the Training; and

WHEREAS, funding for this conference is available in the 2026 Police Department budget, Account A1312000-541000. The cost for this training is $435.00.

NOW THEREFORE BE IT RESOLVED, the Investigator from the Irondequoit Police Department is authorized to attend the 2026 Child Abuse Summit in Rochester, NY from April 22nd-April 23rd, 2026.

This resolution shall take effect immediately upon its adoption.

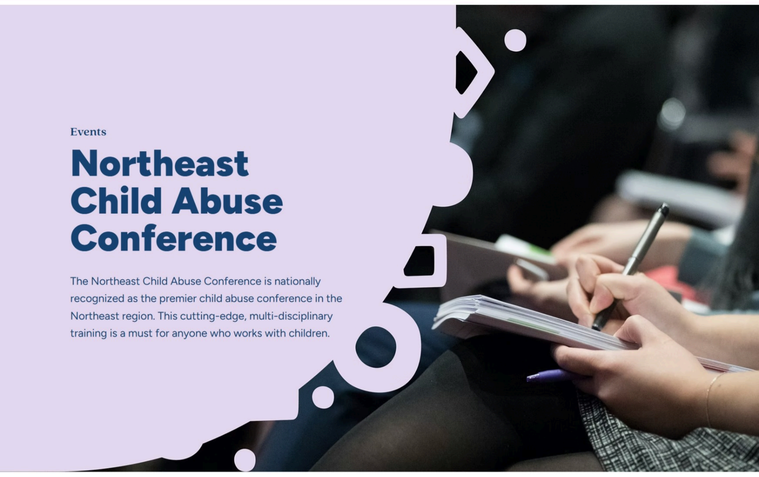
Seconded by the Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Supervisor	Wehner	voting_____
Town Board Member	Malone	voting_____
Town Board Member	Cunningham	voting_____
Town Supervisor	Perticone	voting_____

Events

Northeast Child Abuse Conference

The Northeast Child Abuse Conference is nationally recognized as the premier child abuse conference in the Northeast region. This cutting-edge, multi-disciplinary training is a must for anyone who works with children.



The Child Advocacy Center of Greater Rochester | *The Northeast* Child Abuse Conference

Northeast Child Abuse

Wednesday April 22 - Thursday 23, 2026

Rochester Riverside Convention Center

Leave

$435	$495
Early Bird ends Feb. 2nd	Begins Feb. 3rd

Register Now

Keynote Speaker: Craig Zablocki

Making a profound and long-lasting impact for over 30 years, Craig has addressed well over one million people internationally, in all 50 states, and across industries.



With a background as an inner-city teacher, and a lion-hearted passion to make a positive difference for children and families, Craig's influence in the child advocacy arena, with Child and Family Services, with kids at risk, and those who serve them, has been significant.

It's no surprise that Craig has been invited twice to keynote the National Child Abuse Prevention Conference, twice to keynote the National Boys and Girls Clubs, and the National W.I.C. Conference, as well as New Hampshire Children's Trust, Alexandria's Child Advocacy Conf., numerous state victim advocacy associations, Parent Possible twice, lots of cops, gang members, parole and probation officers, hundreds of school district and special needs teachers, Wyoming's Meth Conference, Affective Needs Teachers Conference for Children with Behavioral Needs, social workers groups. For nearly three decades, Craig has been pointing to kids, their inherence qualities and goodness, while asking the provocative question--What can we learn from kids?

Craig's style is highly interactive, direct, full of spontaneous positive humor. No power point! Authentic change and fresh perspectives are arrived at through shared laughter and Craig's capacity for engaging everyone. The affect is meaningful and life-renewing, especially for those dealing with intense adversity, trauma, stress and challenge.

Craig was the first outside speaker invited to address the students at Columbine after the 1999 tragedy. Though his keynotes and trainings, Craig has impacted hundreds of school districts across the U.S. and Canada. Craig was invited twice to address the Association of Teacher Educators (these are 1,800 Professors who teach our teachers). Craig was voted (twice) in the top 2% of the best 150 speakers in the U.S. by the National Society of Human Resource Managers (14,000 voting members).

Check out Craig's website at www.Craigzablocki.com, along with his book, Improv 101, Unleashing Your Creative Spirit (written with educators in mind).

Learn More

Purchase a Sponsorship

With multiple sponsorship levels, there are a variety of ways to directly support our conference this year. Plus, Exhibitor opportunities are available. Get more info.

Download Brochure

Our Sponsors

NEW YORK STATE | Division of Criminal Justice Services

Daisy Marquis Jones Foundation

NEW YORK STATE | Office of Children and Family Services

Email Sign Up

Stay up to date on The Child Advocacy Center of Greater Rochester.

Enter your email

Enter your first name | Enter your last name

Submit

Proud to be a COMMUNITY IMPACT PARTNER United Way. United Way of Greater Rochester Helping People Reach Their Potential. Livingston, Monroe, Ontario, Wayne, and Wyoming Counties.

Backed by National Children's Alliance® Accredited Member

CHARITY NAVIGATOR ★★★★ Four Star Charity

Platinum Transparency 2025 Candid.

Resolution No. 2026-

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING AN AGREEMENT BETWEEN THE TOWN OF IRONDEQUOIT, THE IRONDEQUOIT POLICE DEPARTMENT, AND GEORGE W. LONG, INC. d/b/a SEA BREEZE PARK

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February, 2026, at 7:00 p.m. local time, there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member ____ ____ offered the following resolution and moved its adoption:

WHEREAS, the Town Clerk's Office received an application from Shamrock Jack's Restaurant to conduct its annual St. Patrick Day's Festival from March 14th to March 17th, 2026 (the "Festival"); and

WHEREAS, the Festival will be held at Shamrock Jack's current location at 4554 Culver Road and outside that location in a temporary tent structure; and

WHEREAS, Shamrock Jack's has arranged with George W. Long, Inc. d/b/a Sea Breeze Park ("Sea Breeze") to allow parking for the Festival at Sea Breeze Amusement Park; and

WHEREAS, Sea Breeze would like to provide for the presence of uniformed Irondequoit Police Department ("IPD") officers at Sea Breeze Amusement Park while it is used for parking for the Festival; and

WHEREAS, officers will be assigned to Sea Breeze only during overtime hours and only if not needed elsewhere, Sea Breeze will pay the Town for the officers' services at the overtime rate of whichever officer is present, the IPD will have the discretion to assign officers to the Event and dispatch such officers to other locations to assist in maintaining public safety in the event that an unforeseen emergency occurs, and such officers will remain under IPD control and supervision.

NOW THEREFORE BE IT FURTHER RESOLVED, that the Town Board authorizes and approves of the Agreement with Sea Breeze in substantially the form annexed hereto as **Attachment A,** and in such final form as approved by the Attorney for the Town, and authorizes the Town Supervisor and the Chief of Police to execute the Agreement and all other documents related thereto.

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Supervisor	Wehner	voting_____
Town Board Member	Malone	voting_____
Town Board Member	Cunningham	voting_____
Town Supervisor	Perticone	voting_____

AGREEMENT

THIS AGREEMENT made this 15th day of January, 2026, between the TOWN OF IRONDEQUOIT, a municipal corporation existing under the laws of the State of New York with an office at 1280 Titus Avenue Rochester, New York 14617 (the "Town"), the IRONDEQUOIT POLICE DEPARTMENT with offices at 1300 Titus Avenue, Rochester, New York 14617 (the "Police") and GEORGE W. LONG, INC., d/b/a SEA BREEZE PARK, with offices at 4600 Culver Road, Rochester, New York 14622 ("Sea Breeze").

RECITALS

WHEREAS, Sea Breeze would like to engage the services of the Police on March 14, 2026, from 12:00 PM until 11:00 PM, and again on March 17, 2026, from 12:00 PM until 11:00 PM ; and

WHEREAS, Sea Breeze requests the assignment of Police Officers on a reimbursable overtime basis for traffic and crowd control; and

WHEREAS, the Town and the Police have agreed to provide the services requested by Sea Breeze.

NOW, THEREFORE, in consideration of the mutual covenants herein, the parties agree as follows:

1. **RESPONSIBILITIES**: The Police agree to assign an officer or officers, the exact number to be determined by the Police in its discretion, at the parking locations at 4600 Culver Road, Rochester, New York, from 12:00 PM until 11:00 PM on March 14th, 2026, and from 12:00 PM until 11:00 PM on March 17, 2026 (these dates, collectively, the "Event"). This Agreement will expire at 3 AM on March 18, 2026. The Police will retain the sole discretion to dispatch an officer assigned to the Event to another location to assist in maintaining public safety, if the Police determine such reassignment is necessary. Police personnel assigned to the Event will be under the direct control and supervision of the Irondequoit Police Department only.

2. **CONSIDERATION**: In consideration for the provision of the services described above, Sea Breeze will reimburse the Town at the overtime rate of whatever police officer or officers are assigned to the Event by the Police. The overtime rate must include all fringe benefits, such as but not limited to, payroll taxes and New York State Retirement contributions, so that the Town's costs are fully covered Sea Breeze. After the Event, the Town will invoice Sea Breeze for the services rendered pursuant to this agreement. Sea Breeze will pay the invoice within 30 days after its issuance.
3. **INJURY TO POLICE PERSONNEL**: Sea Breeze agrees to cover the lost wages and medical costs, immediate and recurring, for any Police Personnel working at

the Event pursuant to this agreement that result from Sea Breeze's negligence in not maintaining the premises in a safe condition, such as (but not limited to) a slip and fall or exposure to toxic substances. The Town will continue to be responsible for any injury to Police Personnel resulting from required police work such as arrests or physical restraints of subject(s).

4. **RELEASE AND INDEMNIFICATION**: Sea Breeze shall indemnify and hold harmless the Town and the Police from any and all claims, liability, suits, actions, responsibilities, judgments and loss, including reasonable attorneys' fees which it shall suffer, or which shall be made against it on account of loss of life, personal injury, or property damage received or sustained by any person, by reason of any act or omission on part of Sea Breeze, its officers, employees, agents. invitees or contractors, except that Sea Breeze shall not be required to indemnify the Town or the Police for any such damage or loss arising out of any grossly negligent acts of the Town and the Police, their officers, employees, contractors or agents.

5. **INSURANCE**: Sea Breeze shall procure and maintain a policy of insurance for this agreement. The policy of insurance required is a general liability insurance (including, without limitation, contractual liability and dram shop coverage) with single limits of liability in the amount of $1,000,000.00, $3,000,000.00 in the aggregate, of which $1,000,000.00 of the aggregate coverage may be provided by an umbrella policy. Original certificates evidencing such coverage and indicating that such coverage shall not be canceled or amended in any way without thirty (30) days' prior notice to the Town and the Police, shall be delivered to the Town and the Police at the time of execution of the Agreement. Sea Breeze's insurance shall provide for and name the Town and the Police as additional insureds and shall insure the Town and the Police for all claims relating to this agreement. All policies of insurance shall be issued by companies in good financial standing, duly and fully qualified and licensed to do business in New York State, and otherwise acceptable to the Town and the Police. Failure to provide such proof of insurance shall be grounds to cancel this Agreement.

6. **RELATIONSHIP OF PARTIES**: Sea Breeze acknowledges and represents that the Town and the Police are not partners, joint ventures, or sponsors of Sea Breeze.

IN WITNESS WHEREOF, the parties hereto have executed this instrument as of the date first above written.

TOWN OF IRONDEQUOIT

Town Supervisor

Scott Peters, Chief of Police

GEORGE W. LONG, INC. d/b/a SEA BREEZE PARK

Genevieve Norris-Brown
General Manager / Owner

STATE OF NEW YORK) COUNTY OF MONROE) ss.:

On the 15th day of January, in the year 2026, before me, the undersigned, a Notary Public in and for said state, personally appeared **John Perticone** personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within instrument and acknowledged to me that he executed the same in his capacity, and that by his signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

Notary Public

KATIE M. PALERMO
Notary Public - State of New York
No. 01PA6008745
Qualified in Monroe County
My Commission Expires April 28, 2027

STATE OF NEW YORK) COUNTY OF MONROE) ss.:

On the 15th day of January, in the year 2026, before me, the undersigned, a Notary Public in and for said state, personally appeared **Scott Peters**, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within

instrument and acknowledged to me that he executed the same in his capacity, and that by his signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

Katie M. Palermo

Notary Public

KATIE M. PALERMO
Notary Public - State of New York
No. 01PA0006745
Qualified in Monroe County
My Commission Expires April 28, 2027

STATE OF NEW YORK) COUNTY
OF MONROE) ss.:

On the 14 day of January, in the year 2026, before me, the undersigned, a Notary Public in and for said state, personally appeared Genevieve Norris-Brown, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within instrument and acknowledged to me that he executed the same in his capacity, and that by his signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

Sarah L Beaumont

Notary Public

SARAH L BEAUMONT
Notary Public - State of New York
No. 01BE6297385
Qualified in Monroe County
My Commission Expires 2/24/26

Resolution No. 2026- _____

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING ATTENDANCE TO GROUP CRISIS INTERVENTION COURSE

At the regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member _____offered the following resolution and moved its adoption:

WHEREAS, the Chief of Police recommends sending two (2) Irondequoit Police Officers to the Group Crisis Intervention course located in Depew, New York on February 23rd - February 24th, 2026. This two-day course is to increase awareness on concepts relevant to Crisis Intervention along with Disaster Mental Health Intervention, to understand the nature and importance of Incident Assessmentand Strategic Intervention Planning, Crisis Management Briefings, Defusing Criss Interventions and more; and

WHEREAS, the approximate cost of the course totals $300.00 and funding for this training is available in the 2026 Police Department budget, Account A131200-541000.

NOW, THEREFORE BE IT RESOLVED, that the Town Board hereby authorizes two (2) Officers from the Irondequoit Police Department to attend the Group Crisis Intervention course in Depew, New York, February 23rd - February 24th, 2026; and

AND BE IT FURTHER RESOLVED, that the Town Board grants authority to the Town Supervisor to execute any and all documents related to this in a format approved by the Attorney for the Town.

This resolution shall take effect immediately upon its adoption.

Seconded by the Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Supervisor	Wehner	voting_____
Town Board Member	Malone	voting_____
Town Board Member	Cunningham	voting_____
Town Supervisor	Perticone	voting_____

TRAINING ANNOUNCEMENT

The Western New York Law Enforcement Helpline, dedicated to serving the emergency services community, is pleased to announce the following 2-day course:

GROUP CRISIS INTERVENTION

Dates: Monday, February 23rd, 2026 and Tuesday, February 24th, 2026
Time: 8:30am-4:30pm both days
Location: Centerpointe Community Church
56 Burlington Ave.
Depew, New York 14043

This is an International Critical Incident Stress Foundation (ICISF) developed curriculum. Advantages of attending are:

- Participants will learn how to provide group crisis intervention using proven methods
- Participants will receive a certificate of completion from the ICISF
- Participants will receive continuing education credits from the University of Maryland at Baltimore
- This course is required for persons pursuing the ICISF Certificate of Advanced Training

LEARNING OBJECTIVES

- To increase awareness of key terms and concepts relevant to the practice of crisis intervention and disaster mental health intervention.
- To become familiar with relevant research findings and recommendations for practice.
- To understand the nature and importance of incident assessment and strategic intervention planning.
- To understand the nature of the "resistance, resilience, recovery" continuum and the role of the integrated, multi-component, Critical Incident Stress Management system (CISM).
- To become familiar with large group crisis interventions:

  -Rest, Information & Transition Service (RITS; formerly called Demobilization)
  -Crisis Management Briefings

- To become familiar with small group crisis interventions:

-Defusing
-Critical Incident Stress Debriefing (CISD)

- To become familiar with risks of adverse outcome associated with crisis intervention and how to reduce those risks.

Presenters: Anthony Victor LeBron, CTR, CCISM is retired from the Buffalo Police Department after a 33-year career. In his tenure he served in various capacities to include: Community Police Officer, FBI certified Hostage Negotiator, and leader of the BPD Peer Team. He presents on Law Enforcement Suicide at the Erie County Law Enforcement Training Academy and at Supervision school. He presently is the President of the Western New York Law Enforcement Helpline.

Brian Flynn, LCSW is a clinical social worker with nearly 25 years of teaching and clinical experience working with law enforcement and other first responders. He is a university lecturer and holds a certification in critical incident stress management. Brian earned his Master's Degree in Social Work from SUNY Albany, his Master's Degree in Social Science from Binghamton University and a Bachelor's Degree in Psychology from the University of Arizona.

Please do not register if you cannot commit to attending both days in their entirety. Registration is limited to 30 persons. Only persons who are registered by 8:30am and stay until 4:30pm both days will receive credit for the course and a certificate of completion. Lunch, coffee and water will be provided both days.

Questions about registration can be directed to Melissa Harte at 716-578-2419 or via email at mharte@wnyleh.org

Questions about the curriculum can be directed to Anthony LeBron at 716-440-4750 or via email at Avlebron@wnyleh.org

REGISTRATION FORM

Please use the following link: https://forms.gle/LAMqKEddTJAb5MoNA

GROUP CRISIS INTERVENTION

Monday February 23rd and Tuesday February 24th, 2026

Persons who are interested in attending the training must complete the registration form and send the appropriate payment. Please complete a new registration form for each registrant. Registrations will be handled on a first come, first serve basis. *All registrants will be notified whether or not they have been accepted into the class*. REGISTRATION CLOSES ON MONDAY FEBRUARY 16th, 2026.

Two-Day Course Fee Schedule: $150.00 USD

PAYMENT MUST BE RECEIVED BY THE FEBRUARY 16th, 2026 DEADLINE and can be made by personal check, business check, money order or purchase order payable to WNY Law Enforcement Helpline, Inc. (WNYLEH). Cancellations received by February 16th will be accepted and the check returned or destroyed. For all others, payment will be retained for costs already accrued from your initial registration.

Please submit payment to WNY Law Enforcement Helpline (WNYLEH):

Address: PO Box 1014, Buffalo, NY 14220

Email: mharte@wnyleh.org

PLEASE NOTE:

- Should you need to cancel, please notify Melissa as soon as possible so we may fill your seat with another registrant.
- Please dress casually, comfortably, and in layers as the temperature in the room may fluctuate.
- We hope you will take advantage of this valuable training opportunity and help us continue building a culture of resilience and support across our public safety community.

Resolution No. 2026- _____

EXTRACT OF THE MINUTES OF A MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION AUTHORIZING REIMBURSEMENT TO THE LIVINGSTON COUNTY SHERIFF'S OFFICE PER GENERAL MUNICIPAL LAW 72C

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member_____ offered the following resolution and moved its adoption:

WHEREAS, the Irondequoit Police Department hired Officer Hunter Little on January 2nd, 2026. He was a full-time Police Officer employed by the Livingston County Sheriff's Office and worked for them for less than 3 years. According to NYS General Municipal Law 72C the Livingston County Sheriff's Office is legally able to be refunded the amount of training benefits while being employed by said department; and

WHEREAS, the approximate cost of training benefit payment totals $1,365.85 and funding for this 2026 Police Department budget, Account A131200-541250.

NOW, THEREFORE BE IT RESOLVED, that the Town Board hereby authorizes payment reimbursement to the Livingston County Sheriff's Office for Officer Hunter Littles training benefits according to NYS General Municipal Law 72C; and

AND BE IT FURTHER RESOLVED, that the Town Board grants authority to the Town Supervisor to execute any and all documents related to this in a format approved by the Attorney for the Town.

This resolution shall take effect immediately upon its adoption.

Seconded by the Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Supervisor	Wehner	voting_____
Town Board Member	Malone	voting_____
Town Board Member	Cunningham	voting_____
Town Supervisor	Perticone	voting_____

LIVINGSTON COUNTY SHERIFF'S OFFICE

INVOICE

Invoice #	2026-001
Invoice Date	01/02/2026

BILL
TO Town of Irondequoit Police
1300 Titus Ave
Rochester, NY 14617

DESCRIPTION	TOTAL
NYS General Municipal Law 5 72-c Expenses of Members Attending Police Training Schools	
Deputy Hunter Little	
Expenses during Finger Lakes Law Enforcement Academy attendance 05/15/2023 — 10/20/2023	
Tuition - $0 (Tuition paid by Little)	
Wages - $5071.11 (9/25-10/20/2023 Fro period)	
Transportation (0 days x 0 miles round trip = 0 miles x 2023 IRS mileage rate 0.655/mile = $0	
Total academy expenses = $5071.11	
Academy Graduation Date 10/20/2023 — Resignation Date 01/01/2026	
Days of employment post-graduation = 800	
Per diem rate ($5071.11 total expense / 1095 days (3 years) = $4.63/day	
$4.63 x 295 (1095 - 800 days) = $1365.85	$1365.85
TOTAL INVOICE	$1365.85

Please make checks payable to:
Livingston County Sheriff's Office
4 Court Street
Geneseo, NY 14454

Please contact the Sheriff's Office at 585.243.7120 with any questions.

Resolution No. 2026-

EXTRACT OF MINUTES OF MEETING OF TOWN BOARD AUTHORIZING ACCEPTANCE Of THE 2025 ASPCA NEW YORK SHELTER STANDARDS IMPLEMENTATION GRANT: ANIMAL ISOLATION AREA & KENNEL UPGRADES IN THE AMOUNT OF $75,000.00

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026, at 7:00 p.m. local time, there were

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin PC Attorney for the Town

Town Board Member_____ offered the following resolution and moved its adoption:

WHEREAS, The American Society for the Prevention of Cruelty to Animals (the "ASPCA") has granted the Town of Irondequoit Animal Control Department the total amount of $75,000.00 to upgrade the Animal Isolation areas along with Kennel Upgrades to the Irondequoit Animal Control Department.; and

WHEREAS, the Irondequoit Animal Control Department must follow the ASPCA organizational standards and has 12- months or until expiration date whichever is sooner, to comply with the requirements and provide proof of compliance as part of its required reporting. The grant effective date is 12/21/2025 and the grant expiration date is 12/31/2026; and

WHEREAS, the Town Board determines that accepting the Grant and the Grant activities constitute Type II actions pursuant to 6 NYCRR § 617.5(c)(26) (routine or continuing agency administration and management, not including new programs or major reordering of priorities that may affect the environment) and (31) (purchase or sale of furnishings, equipment or supplies, including surplus government property, other than the following: land, radioactive material, pesticides, herbicides, or other hazardous materials) and therefore no further review is needed pursuant to the New York State Environmental Quality Review Act (6 NYCRR § 617.5(a)).

NOW THEREFORE BE IT RESOLVED, that the Town Board accepts the Grant for The Irondequoit Animal Control Department for the expiration date of 12/31/2026 in the total amount of $75,000.00;

AND BE IT FURTHER RESOLVED, that that any and all actions taken by the Town Supervisor, Acting Supervisor, or Chief of Police prior to the date of adoption of the foregoing resolutions which would have been authorized by the foregoing resolutions but for the fact that such actions were taken prior to such date, be, and each hereby is, ratified, approved, confirmed and adopted as a duly authorized act of the Town in all respects and for all purposes.

This resolution shall take effect immediately upon its adoption.

Seconded by the Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Supervisor	Wehner	voting_____
Town Board Member	Malone	voting_____
Town Board Member	Cunningham	voting_____
Town Supervisor	Perticone	voting_____

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

Grant Agreement Reference:

NAME: **Town of Irondequoit Animal Control Department**
PROJECT: **2025 ASPCA New York Shelter Standards Implementation Grant: Animal Isolation Area & Kennel Upgrades**
AMOUNT: **$ 75,000**
GRANT NUMBER: **202512-34218**
GRANT EFFECTIVE DATE: **12/21/2025**
GRANT EXPIRATION DATE: **12/31/2026**
ASPCA GRANT OFFICER: **Christa Chadwick**
ASPCA GRANT MANAGER: **Erin Luebkeman**

December 30, 2025

Scott Donahue
1280 Titus Avenue
Rochester, NY 14617

Dear Scott Donahue,

The American Society for the Prevention of Cruelty to Animals (the "ASPCA") is deeply honored to be able to grant to Town of Irondequoit Animal Control Department (the "Grantee," and together with the ASPCA, the "Parties" and each a "Party") the amount of $ 75,000 (the "Grant"). These funds are designated for 2025 ASPCA New York Shelter Standards Implementation Grant: Animal Isolation Area & Kennel Upgrades, as described in the Grant request, the Grant Request Documents, and, if applicable, its amendments (the "Project") and subject to the terms of this agreement (the "Agreement").

The ASPCA shall issue the Grant to the Grantee approximately two to six weeks following receipt of the signed original contract, including all pages. By signing this Agreement, you represent and warrant that Grantee will meet the obligations specified in this Agreement.

Intending to be legally bound and in consideration of the Grant provided to the Grantee and the desire of the Grantee to conduct the Project, the parties hereby agree to the following terms and conditions as of the first date listed above (the "Effective Date"):

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

1. Grant Requirements. The Grantee acknowledges and agrees that the Grant shall be used exclusively for costs incurred directly in connection with the Project and as set forth in this Agreement, and that failure to do so will result in the Grantee having to return the Grant to the ASPCA within ten (10) days of the ASPCA's request to do so.

The Grantee acknowledges and agrees that any proposed changes to the Project, including, but not limited to, the Project goals and objectives, the use or purpose of funds, the distribution of funds across approved budget items, or any other substantive changes to the Project shall be fully approved by the Grant Officer and memorialized with an amendment to the Agreement prior to initiating any such changes.

Unless Grantee is expressly exempt from this requirement (e.g. as an agency or instrumentality of government), it shall meet the ASPCA Grantee Organizational Standards (the "Standards"), attached hereto as **Schedule 1**. If Grantee does not meet the standards by the Effective Date, the ASPCA may, in its sole discretion, grant additional time for the Grantee to come into compliance with the Standards. If additional time is granted, Grantee shall have 12-months or until the Expiration Date, whichever is sooner, to comply with the requirements and provide proof of compliance as a part of its required reporting.

The Grantee agrees that at no time will any funds it receives from the ASPCA be used to attempt to influence the outcome of any selection, nomination, election, or appointment of any individual to any public office or office of a political organization within the meaning of Internal Revenue Code Section 527(e)(2), and shall furthermore not use any of the funds it receives from the ASPCA to participate in, or intervene in (including the publishing or distributing of statements) any political campaign on behalf of (or in opposition to) any candidate for public office.

For projects that include grant funds used to purchase food for a gathering of individuals, the Grantee will limit the use of ASPCA funds to purchase vegetarian, vegan, fish or welfare-certified meat products only. "Welfare-certified meat products" shall mean products that are from farms, obtained either directly or through another supplier (restaurant, retailer, etc.), that are certified by at least one of the following certification programs: (a) Animal Welfare Approved; (b) Certified Humane; and/or (c) Global Animal Partnership, Steps 2 and above. For more information about welfare-certified products or where to locate welfare-certified products, please visit http://www.aspca.org/take-action/help-farm-animals/finding-higher-welfare-products.

Employees, volunteers or other associates of the Grantee whose food expenses are reimbursed or otherwise paid from ASPCA grant funds, including, but not limited to beneficiaries of travel stipends and scholarships, are strongly encouraged to choose higher-welfare meat products, fish, vegan or vegetarian food.

Grant Reporting:

The Grantee must submit reports (the "Grant Reports") to provide the ASPCA with information about the Project and to ensure the Grant is being used as described in this Agreement. Grant Reports shall be due per the following schedule:

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

Report Type	Due Date
Final Report	01/14/2027

The Grantee acknowledges it may be subject to additional reporting requirements as assigned by its ASPCA Grant Officer and set forth in the Grant record in Fluxx (the "Additional Reporting"). Additional Reporting shall be submitted as a part of the regular Grant Reports.

Grantees that fail to submit required documentation by the Final Report Due Date may jeopardize future grants and/or grant payments.

Grant Extensions:

Extension requests will not be considered for the Final Report Due Date. However, should the Grantee need a Grant extension due to unforeseen delays in the Project timeline, Grantee may request an extension by emailing grants@aspca.org before the Grant Expiration Date. The ASPCA shall review the Grantee's request and may grant an extension to the Grant term. If the ASPCA declines the request for an extension, or if the Project is completed but carries a balance of unspent funds, the Grantee shall promptly refund and pay back to the ASPCA the unexpended balance.

Ad Hoc Requirements:

The ASPCA may request additional information regarding the Project. Upon such a request, the Grantee must provide the requested information in a timely manner. Such additional information may include but is not limited to receipts, photographs, and press information.

The ASPCA may choose to conduct site visits of the Grantee's location(s). The Grantee must provide the ASPCA with access to such locations at a date and time mutually agreed upon by the Parties.

2. Compliance with the Law and Maintenance of Tax-Exempt Status. In carrying out the Project, the Grantee shall comply with all applicable federal, state and local laws and regulations including but not limited to all applicable federal, state, and local employment laws, regulations, and rules.

The Grantee agrees that it is the sole employer of all individuals who are compensated in whole or in part with Grant funds, or whose employment, fellowship or internship position arises in any way as a direct or indirect result of the Grant (each a "Funded Position"). The Grantee further agrees that it is exclusively responsible for the classification and engagement of any contractors whose fees and/or expenses are paid in whole or in part with Grant funds ("Funded Contractor"). Accordingly, the Grantee agrees that with respect to any Funded Position and/or any Funded Contractor, the Grantee is exclusively responsible for compliance with, and will comply with, any and all applicable federal, state and local employment laws, regulations and rules, including, but not limited to, any employer obligations to: (a) timely pay all wages or other compensation due; (b) withhold and remit employment taxes; (c) administer any required discipline; (d) provide insurance coverages; (e) prohibit discrimination or harassment based on any protected characteristic; and (f) provide any required leave or accommodation. The Grantee acknowledges and agrees that the parties to this Agreement are in the relationship of Grantor and Grantee, and the use of Grant funds for Funded Positions and/or Funded

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

Contractors does not constitute a joint venture, affiliation, or joint employment relationship of any kind.

If the Grantee is a 501(c)(3) organization, the Grantee certifies that it is in good standing with the Internal Revenue Service and shall notify the ASPCA immediately of any change in, or challenge by the Internal Revenue Service to, its status as a 501(c)(3) tax-exempt organization.

3. License. Each Party hereby grants to the other party a license to use the Party's name and trademarks on materials directly related to the activities of the Project and/or the Grant.

All use of the ASPCA name and trademarks must comply with the ASPCA's style guide. "ASPCA Trademarks" are: "ASPCA®", which must always appear in PMS 422 and 021, unless used in materials that are completely black and white in nature, in which case it may appear in black; and "The American Society for the Prevention of Cruelty to Animals®".

4.Acknowledgement of ASPCA Support. In consideration of the Grant, the Grantee may publicly acknowledge that the Project was made possible through a generous grant from the ASPCA. If the Grantee chooses to make an acknowledgment, Grantee shall submit any Project acknowledgements that include the ASPCA's name or trademarks to press@aspca.org for review and approval prior to its inclusion in any materials prepared and intended to be distributed regarding the activities of the Project. No changes on the approved version of any Project acknowledgements shall be instituted by the Grantee without the prior written approval of the ASPCA. The ASPCA has the right in its sole discretion to require the Grantee to remove all references to the ASPCA's involvement if the ASPCA determines that the Grantee is not fulfilling its obligations under this Agreement or if for any other reason the ASPCA determines that it is no longer in the ASPCA's best interest to be referenced in such manner.

For further assistance regarding recognition of the Grant, including press releases, advisories, or general media outreach, please contact the ASPCA's Media Department at press@aspca.org or visit https://www.aspcapro.org/media-and-promotional-materials-aspcar-grant-recipients for press release templates, logos, and other media materials.

5. Records. The Grantee will keep accurate books and records with respect to the grant in accordance with Generally Accepted Accounting Principles (GAAP) and business practices. The Grantee will keep records of receipts and expenditures made of Grant funds as well as copies of the reports submitted to the ASPCA and supporting documentation for at least three (3) years after completion of the use of the Grant funds, and will furnish or make available such books, records, and supporting documentation to the ASPCA for inspection at reasonable times from the time of the Grantee's acceptance of the Grant through such period.

6. Termination. The ASPCA may, in its sole discretion (i) withhold payment of funds until in its opinion the situation has been corrected or (ii) declare the Grant terminated in any of the following circumstances:

a. If, as the result of the consideration of reports and information submitted to it by the Grantee or from other sources, the ASPCA, in its sole discretion, determines that continuation of the Project is not reasonably in furtherance of the ASPCA's mission to provide effective means for

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

the prevention of cruelty to animals throughout the United States (the "ASPCA Mission") or that the Project is not being executed in substantial compliance with the grant request (or work plan as revised) or that the Grantee is incapable of satisfactorily completing the work of the Project;

b. In the case of any violation by the Grantee of the terms and conditions of this Agreement;
c. In the event of any change in, or challenge by the Internal Revenue Service to, the Grantee's status as a 501(c)(3) tax-exempt organization if applicable; or
d. If it is revealed that, during the Project, the Grantee is or was involved in any activity or makes any statement disparaging of, or reflecting unfavorably upon the ASPCA, tarnishes the reputation of the ASPCA or is not in alignment with the ASPCA Mission.

If the ASPCA terminates the Grant, it shall so notify the Grantee, whereupon it, if so requested by the ASPCA, shall promptly refund and pay back to the ASPCA any unexpended balance of the Grant funds in the Grantee's hands or under its control or any expended Grant funds deemed to have been misappropriated per the terms of this Agreement.

Upon completion of the Project or termination of this Agreement for any reason, the ASPCA will withhold any further payments of Grant funds. All such determinations by the ASPCA under this **Section 6** will be final, binding and conclusive upon the Grantee.

7. Future Funding. The Grantee acknowledges that the ASPCA and its representatives have made no actual or implied promise of funding except for the amounts specified in this Agreement. If any of the Grant funds are returned or if the Grant is rescinded, the Grantee acknowledges that the ASPCA will have no further obligation to the Grantee in connection with this Grant as a result of such return or rescission.

8. Miscellaneous. This Agreement is intended to be binding upon the Grantee and the ASPCA. This Agreement represents the final agreement between the parties with respect to the subject matter hereto, and supersedes any and all prior agreements, written or oral, between the parties with respect to the matters contained herein. This Agreement is not intended to, nor shall it be deemed to create, any partnership or joint venture between the Grantee and the ASPCA. This Agreement shall be interpreted, governed by and construed in accordance with the internal laws of the State of New York, without regard to the conflict of laws principles thereof. The parties hereto acknowledge and consent to personal jurisdiction and venue exclusively in New York, New York with respect to any action or proceeding brought in connection with this Agreement. This Agreement may be executed by the parties hereto in counterparts, each of which, when executed and delivered, shall be deemed to be an original and all of which shall constitute together the same document.

If the terms and conditions of this Agreement are acceptable, please sign this Agreement and return it to us. By signing this Agreement, you represent and warrant that you are capable of binding the Grantee to the terms set forth in this Agreement.

Sincerely,

THE AMERICAN SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

Beverly Jones
Senior Vice President & Chief Legal Officer

ACCEPTED AND AGREED:

Town of Irondequoit Animal Control Department

By (signature of CEO/President/Director): _____

Name/Title: Scott Donahue _____

Docusign Envelope ID: 2A46002A-07E7-4489-8148-D70AB07081A3

Schedule 1

ASPCA Grantee Organizational Standards

- Must have at least 4 board members
- Majority of the board must be independent[1]
- Chairperson and Treasurer shall not be compensated
- Business registration must be current/active in the Grantee's state of incorporation
- Charitable registration must be current/active in the state of the Grantee's primary location **(for grants =>$25,000)**
- No overdue reports for any ASPCA grants, if applicable
- No overdue balances on prior grants, if applicable

[1] This means that fewer than half of Grantee's Board members may be paid employees and/or family members or close relatives.

Resolution No. 2026-

EXTRACT OF THE MINUTES OF MEETING OF A MEETING OF THE TOWN BOARD APPROVING A RESOLUTION AUTHORIZING THE SUPERVISOR TO ENTER INTO AN AGREEMENT WITH THE CITY OF ROCHESTER AND THE TOWN OF IRONDEQUOIT REGARDING PAVING SERVICES

At the regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York on the 17th day of February 2026 at 7:00 P.M. local time; there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor

McConville Considine Cooman & Morin, PC Attorney for the Town

Town Board Member _____ offered the following resolution and moved its adoption:

WHEREAS, the City of Rochester has approached and met with the Irondequoit Department of Public Works regarding a desire for an Agreement for roadway maintenance services on city streets adjacent to Town of Irondequoit boundary ("Town"); and

WHEREAS, these roadways border the Town of Irondequoit. The majority of these roads are located in the Town of Irondequoit with a small portion located in the City of Rochester. Past practice has been that both the Town and City soley provide maintenance on each respectively owned portion of roadway. This can result in roadway surfaces being of two different types of material and surface life longevity; and

WHEREAS, City and Town of Irondequoit wish to define the chip sealed and/or milled and paved portion of roadways listed and show in attached Agreement being Exhibit A and Exhibit B respectively; and

WHEREAS, this program with improve the quality and integrity of such roadways; and

WHEREAS, the City of Rochester is to reimburse the Town of Irondequoit each fall for the work that was performed that year; and

WHEREAS, the term of this Agreement shall commence upon execution and shall terminate five (5) years from such date. This Agreement may be extended upon mutual agreement of both parties for up to a total of two (2) additional five (5) year terms; and

WHEREAS, this Agreement may be terminated with sixty (60) days written notice to the other party; and

WHEREAS, the City of Rochester and Town of Irondequoit will collaborate annually regarding the list of streets to have performed on.

NOW THEREFORE BE IT RESOLVED that the Town Board authorizes the Supervisor to enter into an Intermunicipal Agreement for Chip Sealing and/or Mill and Paving of City Streets adjacent to Town of Irondequoit Boundary with the City of Rochester;

AND, BE IT FURTHER RESOLVED, that the Town Board authorizes the Supervisor to sign any other documents necessary.

This resolution shall take effect immediately upon its adoption.

Seconded by Town Board Member _____ and duly put to vote, which resulted as follows:

Deputy Town Board Supervisor	Wehner	voting	_____
Town Board Member	Malone	voting	_____
Town Board Member	Cunningham	voting	_____
Town Supervisor	Perticone	voting	_____

Exhibit “A”

AGREEMENT
BETWEEN
CITY OF ROCHESTER
AND
TOWN OF IRONDEQUOIT

CHIP SEAL AND/OR MILL AND PAVING OF CITY STREETS ADJACENT TO TOWN OF IRONDEQUOIT BOUNDARY

This agreement is made, as of _____ January, 2026 by and between the Town of Irondequoit, a municipal corporation having offices at Town Hall, 1280 Titus Avenue, Rochester, New York 14617 (the "Town"), and the City of Rochester, a municipal corporation having offices at City Hall, 30 Church Street, Rochester, New York 14614 (the "City").

WHEREAS: The Town has requested authorization from the City to chip seal and/or mill and pave certain sections of roadways located within the City of Rochester adjacent to the Town boundary.

WHEREAS: The certain sections of roadway to be chip sealed and/or milled and paved are listed and shown in annexed Exhibit A and Exhibit B respectively.

WHEREAS: The Town and City wish to enter into an agreement which defines the chip sealed and/or milled and paving responsibility of certain City roads adjacent to the Town boundary as listed and shown in Exhibit A and Exhibit B respectively.

NOW THEREFORE, it is hereby agreed by and between the parties that the Town will chip seal and/or mill and pave the sections of roadway listed in Exhibit A and shown in Exhibit B pursuant to the terms and conditions specified herein:

1. Prior to March 30th of each year the Town will submit to the City a list of streets located within the City that are proposed to be chip sealed and/or milled and paved during the upcoming year. Only those streets listed and shown on Exhibits A & B may be included on this list. This list will include an estimated cost to complete the chip seal and/or mill and paving. This estimate will include an itemized cost breakdown of the anticipated work and materials.

2. Prior to May 1st of each year the City will submit in writing an approval for the Town to complete the chip seal and/or mill and paving work specified in the list of streets. The City may choose to approve all or a portion of the streets listed.

3. The Town shall only perform work on streets that has been previously approved in writing by the City. After beginning work on any approved street, should the Town realize additional work may be required that was not previously approved, the Town shall submit to the City a description of the work along with an itemized cost breakdown. The Town shall only perform additional work once it is approved in writing by the City.

4. The Town shall notify the City within two (2) business days of completion of work on each street, so that the City has the opportunity to timely inspect the work and determine that it has been completed correctly. Should it be determined by the City that such work is incomplete or has not been completed correctly, the City shall, within two (2) business days of its inspection, notify the Town, who shall immediately take measures to correct the work.

5. Prior to September 30th of each year the Town will submit an invoice along with supporting documentation to the City for the actual cost to complete the chip seal and/or mill and paving. Supporting documentation includes but is not limited to; listing of Town staff, their hourly rate, hours worked on the project, invoices and/or material tickets for rental equipment including operator, oil, stone, tack coat and asphalt. The City reserves the right to withhold payment for any work that is incomplete and/or incorrectly performed.

6. Prior to November 30th of each year and in consideration of the services by the Town, the City will pay the Town a lump sum equal to the amount shown on the invoice.

7. The Town hereby agrees to defend, indemnify and save harmless the City against any and all third party liability, loss, damage, detriment, suit, claim, demand, cost, charge, attorney's fees and expenses of whatever kind or nature which the City may directly or indirectly incur, suffer or be required to pay by reason or in consequence of the carrying out of any of the provisions or requirements of this Agreement, where such loss or expense is incurred directly or indirectly by the

City, its employees, subcontractors or agents, as a result of the negligent act or omission, breach of fault of the Town, its employees, agents or subcontractors, excepting only those resulting from the negligence, omission, breach, fault or intentional misconduct of the City in the conduct of the work under this agreement. If a claim or action is made or brought against the City and for which the Town may be responsible hereunder in whole or in part, then the Town shall be notified in writing and shall be required to handle or participate in the handling of the portion of the claim for which it may be responsible as a result of this section.

8. The Town shall provide proof of the following insurance coverage, if applicable:

    a. General liability insurance with limits of at least $1,000,000 per occurrence and $2,000,000 annual aggregate, that City of Rochester, 30 Church Street, Room 005A, Rochester, New York 14614 be named as an additional insured using ISO Additional Insured Endorsement CG2010; and
    b. Workman's Compensation Insurance coverage carried by the Town for its employees who perform work within the City of Rochester.

9. The term of this agreement shall commence upon execution and shall terminate five (5) years from such date. This agreement may be extended upon mutual agreement of the parties for up to a total of two additional five (5) year terms.

10. Either party may terminate this agreement upon sixty (60) days' written notice to the other party, provided that any services provided by the Town prior to termination is paid for in accordance with the payment terms of this agreement.

11. This agreement constitutes the entire and integrated agreement between and among the parties hereto and supersedes any and all prior negotiations, agreements and conditions, whether written or oral. Any modification or amendment to this agreement shall be void unless it is in writing and subscribed by the party to be changed or by the party's authorized agent.

12. The parties are prohibited from assigning, transferring, conveying, subletting or otherwise disposing of this agreement or any of its contents, or of any right, title or interest therein, or of the power to execute this agreement, to any other person or corporation without the previous written consent of both parties.

13. This agreement shall be governed by and under the laws of the State of New York. In the event that a dispute arises between the parties, venue for the resolution of such dispute shall be the County of Monroe, New York.

14. If any provision of this agreement is held invalid by a court of law, the remainder of this agreement shall be valid and enforceable.

IN WITHNESS WHEREOF, the respective parties have caused this agreement to be executed by their duly authorized representative and their seals, if any, to be affixed hereto the day and year first above written.

City of Rochester

By: _____

Malik Evans, Mayor

Town of Irondequoit

By: _____

John Perticone, Supervisor

STATE OF NEW YORK)

ss:

COUNTY OF MONROE)

On this day of , 20 , before me, the undersigned, personally appeared **Malik Evans**, personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to within this instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

_____

Notary Public

STATE OF NEW YORK)

ss:

COUNTY OF MONROE)

On this day of , 20 , before me, the undersigned, personally appeared **John Perticone**, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to within this instrument and acknowledged to me that he executed the same in his capacity, and that by his signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

_____

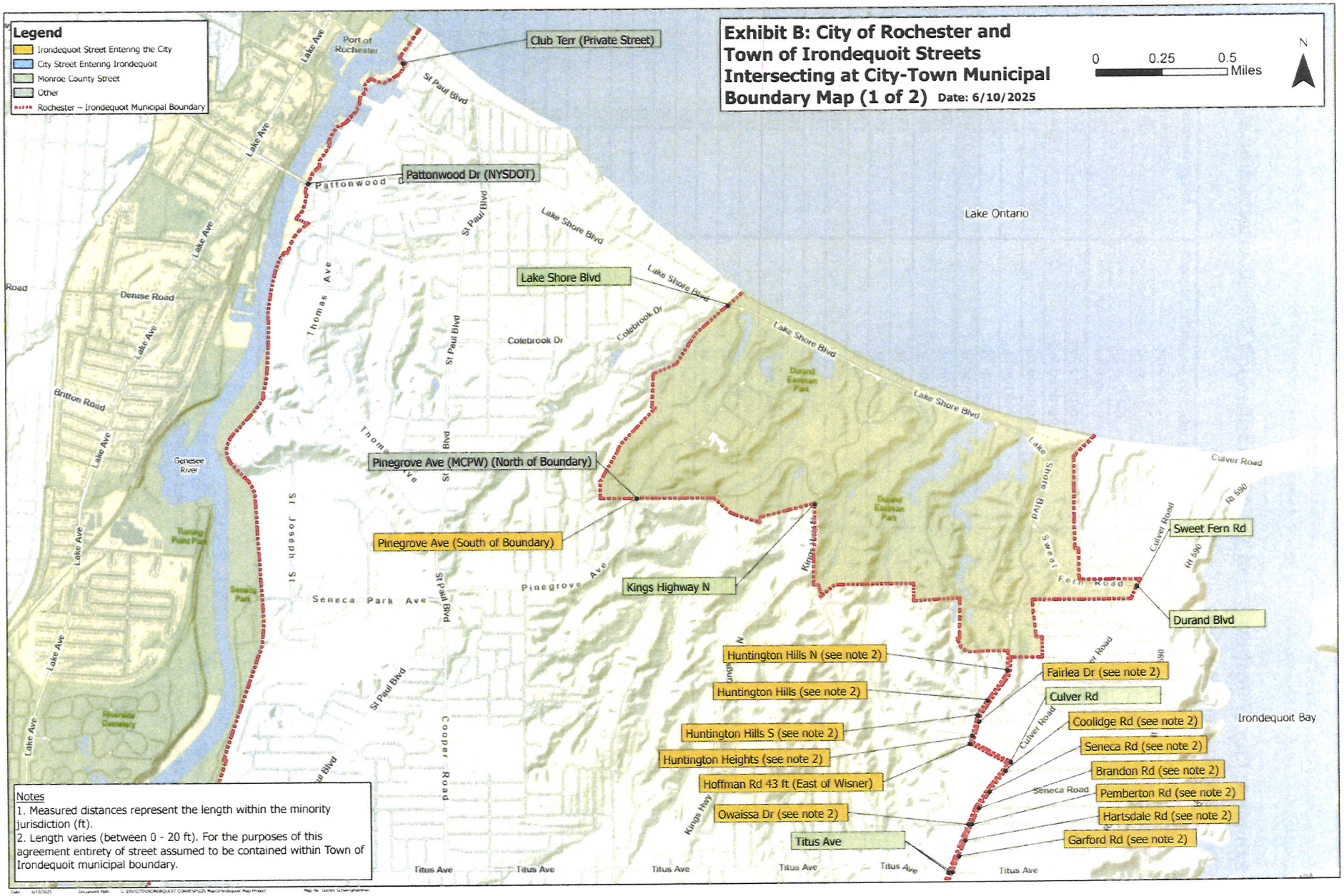
Notary Public

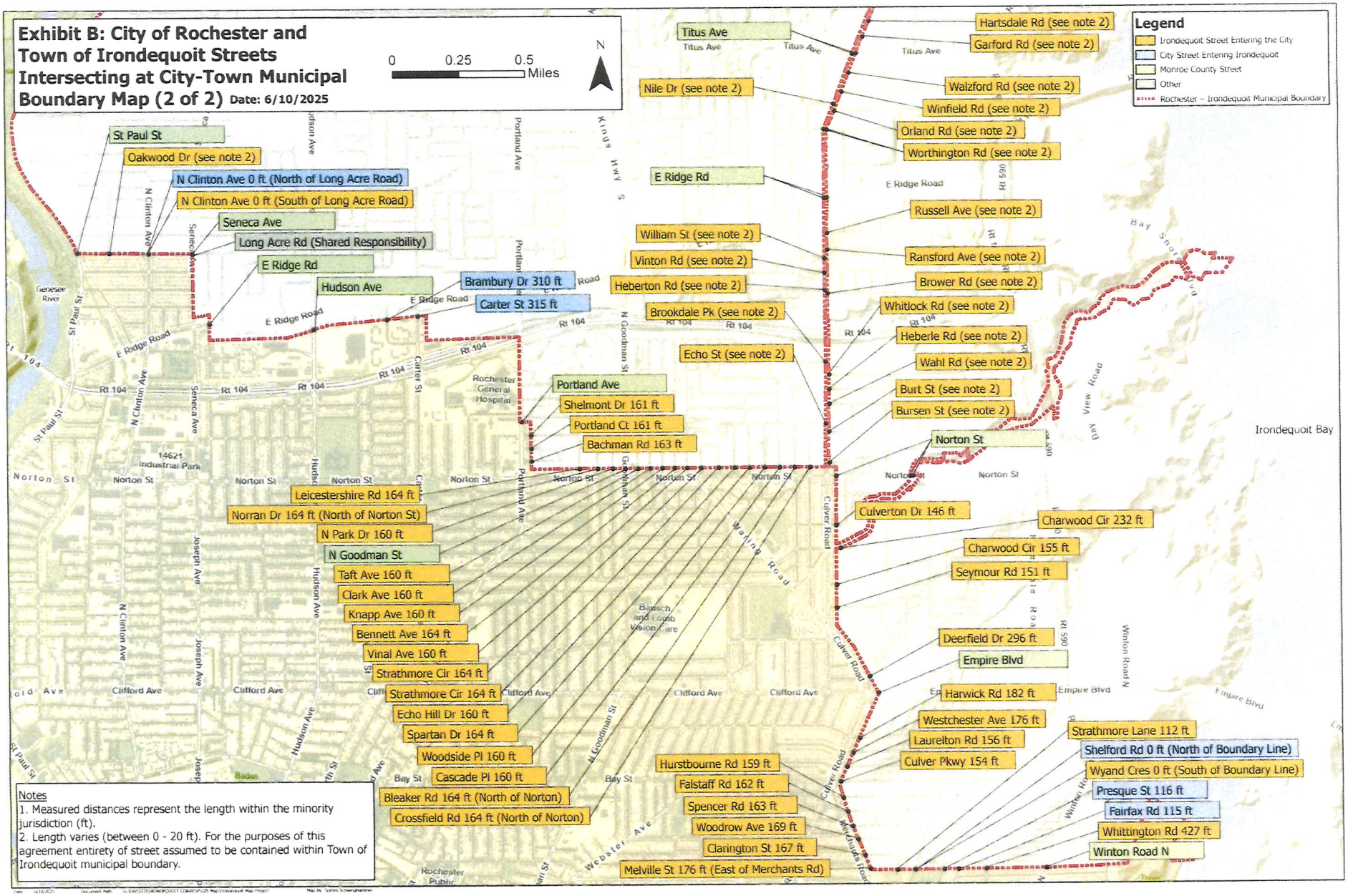
Exhibit A: City of Rochester and Town of Irondequoit Streets Intersecting at City-Town Municipal Boundary

Street Name	Majority Jurisdiction	Terminating Intersection within Minority Jurisdiction	Length within Minority Jurisdiction (feet) (+/-)
Hoffman Rd	Town of Irondequoit	Wisner Rd	43
Brambury Dr	City of Rochester	E Ridge Rd	310
Carter St	City of Rochester	E Ridge Rd	315
Shelmont Dr	Town of Irondequoit	Portland Ave	161
Portland Ct	Town of Irondequoit	Portland Ave	161
Bachman Rd	Town of Irondequoit	Portland Ave	163
Leicestershire Rd	Town of Irondequoit	Norton St	164
Norran Dr	Town of Irondequoit	Norton St	164
N Park Dr	Town of Irondequoit	Norton St	160
Taft Ave	Town of Irondequoit	Norton St	160
Clark Ave	Town of Irondequoit	Norton St	160
Knapp Ave	Town of Irondequoit	Norton St	160
Bennett Ave	Town of Irondequoit	Norton St	164
Vinal Ave	Town of Irondequoit	Norton St	160
Strathmore Cir W	Town of Irondequoit	Norton St	164
Strathmore Cir E	Town of Irondequoit	Norton St	164
Echo Hill Dr	Town of Irondequoit	Norton St	160
Spartan Dr	Town of Irondequoit	Norton St	164
Woodside Pl	Town of Irondequoit	Norton St	160
Cascade Pl	Town of Irondequoit	Norton St	160
Bleaker Rd	Town of Irondequoit	Norton St	164
Crossfield Rd	Town of Irondequoit	Norton St	164
Culverton Dr	Town of Irondequoit	Culver Rd	146
Charwood Cir N	Town of Irondequoit	Culver Rd	232
Charwood Cir S	Town of Irondequoit	Culver Rd	155
Seymour Rd	Town of Irondequoit	Culver Rd	151
Deerfield Dr	Town of Irondequoit	Clifford Ave	296
Harwick Rd	Town of Irondequoit	Culver Rd	182
Westchester Ave	Town of Irondequoit	Culver Rd	176
Laurelton Rd	Town of Irondequoit	Culver Rd	156
Culver Pkwy	Town of Irondequoit	Culver Rd	154
Hurstbourne Rd	Town of Irondequoit	Merchants Rd	159
Falstaff Rd	Town of Irondequoit	Merchants Rd	162
Spencer Rd	Town of Irondequoit	Merchants Rd	163
Woodrow Ave	Town of Irondequoit	Merchants Rd	169
Clarington St	Town of Irondequoit	Merchants Rd	167
Melville St	Town of Irondequoit	Merchants Rd	176
Strathmore Lane	Town of Irondequoit	Farmington Park	112
Presque St	City of Rochester	Brett Rd	116
Fairfax Rd	City of Rochester	Brett Rd	115
Whittington Rd	Town of Irondequoit	Farmington Rd	427

Notes

1. Excludes streets where length varies between 0 - 20 ft. For the purposes of this agreement, entirety of streets with lengths that vary between 0 -20 ft, are assumed to be contained within the Town of Irondequoit municipal boundary.
2. Refer to Exhibit B for Maps


Legend
Irondequoit Street Entering the City
City Street Entering Irondequoit
Monroe County Street
Other
Rochester – Irondequoit Municipal Boundary
Exhibit B: City of Rochester and Town of Irondequoit Streets Intersecting at City-Town Municipal Boundary Map (1 of 2) Date: 6/10/2025
0 0.25 0.5 Miles
N
Club Terr (Private Street)
Pattonwood Dr (NYSDOT)
Lake Shore Blvd
Pinegrove Ave (MCPW) (North of Boundary)
Pinegrove Ave (South of Boundary)
Kings Highway N
Sweet Fern Rd
Durand Blvd
Huntington Hills N (see note 2)
Huntington Hills (see note 2)
Huntington Hills S (see note 2)
Huntington Heights (see note 2)
Hoffman Rd 43 ft (East of Wisner)
Owaissa Dr (see note 2)
Titus Ave
Fairlea Dr (see note 2)
Culver Rd
Coolidge Rd (see note 2)
Seneca Rd (see note 2)
Brandon Rd (see note 2)
Pemberton Rd (see note 2)
Hartsdale Rd (see note 2)
Garford Rd (see note 2)
Lake Ontario
Irondequoit Bay
Notes
1. Measured distances represent the length within the minority jurisdiction (ft).
2. Length varies (between 0 - 20 ft). For the purposes of this agreement entirety of street assumed to be contained within Town of Irondequoit municipal boundary.


Exhibit B: City of Rochester and Town of Irondequoit Streets Intersecting at City-Town Municipal Boundary Map (2 of 2) Date: 6/10/2025
0 0.25 0.5 Miles
N
Legend
Irondequoit Street Entering the City
City Street Entering Irondequoit
Monroe County Street
Other
Rochester – Irondequoit Municipal Boundary
Titus Ave
Hartsdale Rd (see note 2)
Garford Rd (see note 2)
Nile Dr (see note 2)
Walzford Rd (see note 2)
Winfield Rd (see note 2)
Orland Rd (see note 2)
Worthington Rd (see note 2)
E Ridge Rd
Russell Ave (see note 2)
William St (see note 2)
Ransford Ave (see note 2)
Vinton Rd (see note 2)
Brower Rd (see note 2)
Heberton Rd (see note 2)
Whitlock Rd (see note 2)
Brookdale Pk (see note 2)
Heberle Rd (see note 2)
Echo St (see note 2)
Wahl Rd (see note 2)
Burt St (see note 2)
Bursen St (see note 2)
Norton St
Irondequoit Bay
St Paul St
Oakwood Dr (see note 2)
N Clinton Ave 0 ft (North of Long Acre Road)
N Clinton Ave 0 ft (South of Long Acre Road)
Seneca Ave
Long Acre Rd (Shared Responsibility)
E Ridge Rd
Hudson Ave
Brambury Dr 310 ft
Carter St 315 ft
Portland Ave
Shelmont Dr 161 ft
Portland Ct 161 ft
Bachman Rd 163 ft
Leicestershire Rd 164 ft
Norran Dr 164 ft (North of Norton St)
N Park Dr 160 ft
N Goodman St
Taft Ave 160 ft
Clark Ave 160 ft
Knapp Ave 160 ft
Bennett Ave 164 ft
Vinal Ave 160 ft
Strathmore Cir 164 ft
Strathmore Cir 164 ft
Echo Hill Dr 160 ft
Spartan Dr 164 ft
Woodside Pl 160 ft
Cascade Pl 160 ft
Bleaker Rd 164 ft (North of Norton)
Crossfield Rd 164 ft (North of Norton)
Hurstbourne Rd 159 ft
Falstaff Rd 162 ft
Spencer Rd 163 ft
Woodrow Ave 169 ft
Clarington St 167 ft
Melville St 176 ft (East of Merchants Rd)
Culverton Dr 146 ft
Charwood Cir 232 ft
Charwood Cir 155 ft
Seymour Rd 151 ft
Deerfield Dr 296 ft
Empire Blvd
Harwick Rd 182 ft
Westchester Ave 176 ft
Laurelton Rd 156 ft
Culver Pkwy 154 ft
Strathmore Lane 112 ft
Shelford Rd 0 ft (North of Boundary Line)
Wyand Cres 0 ft (South of Boundary Line)
Presque St 116 ft
Fairfax Rd 115 ft
Whittington Rd 427 ft
Winton Road N
Notes
1. Measured distances represent the length within the minority jurisdiction (ft).
2. Length varies (between 0 - 20 ft). For the purposes of this agreement entirety of street assumed to be contained within Town of Irondequoit municipal boundary.

Resolution No. 2026 - ___

EXTRACT OF MINUTES OF MEETING OF THE TOWN BOARD ADOPTING A RESOLUTION APPROVING THE SPECIAL EVENT LICENSE FOR SHAMROCK JACK'S LLC TO CONDUCT THEIR ANNUAL ST. PATRICK'S DAY FESTIVAL

At a regular meeting of the Town Board of the Town of Irondequoit, Monroe County, New York held at the Town Hall, 1280 Titus Avenue, in said Town of Irondequoit, on the 17th day of February 2026 at 7:00 P.M. local time; there were:

PRESENT:

John Perticone	Town Supervisor
Ann Cunningham	Town Board Member
Grant Malone	Town Board Member
Peter Wehner	Deputy Town Supervisor
McConville Considine Cooman & Morin PC	Attorney for the Town

Town Board Member ____ offered the following resolution and moved its adoption:

WHEREAS, the Town Clerk's Office received an application from Shamrock Jack's LLC to conduct their Annual St. Patrick's Day Festival beginning on Friday, March 13, 2026, through Tuesday, March 17, 2026; and

WHEREAS, this event will be conducted both inside their current business location at 4554 Culver Road and outside in a temporary tent structure from McCarthy Tents & Events located on the property; and

WHEREAS, a temporary tent structure will be erected on Tuesday, March 10, 2026, and taken down on Thursday, March 19, 2026; and

WHEREAS, this tent will be used for serving food, beverages and entertainment purposes with no cooking, smoking or open flame activities; and

WHEREAS, there will be car parkers wearing safety vests on premises to control traffic flow and two (2) security guards on each entrance/exit; and

WHEREAS, insurance has been reviewed and approved by the Town Insurance Carrier, expiring on October 4, 2026.

NOW, THEREFORE, BE IT RESOLVED, that the Town Board approves the Special Event License for Shamrock Jack's LLC to conduct their Annual St. Patrick's Day Festival from Friday, March 13, 2026 (equipment set up on Tuesday, March 10, 2026) through Tuesday, March 17, 2026 (equipment take down Thursday, March 19, 2026), upon the condition that Shamrock Jack's notifies all affected residents before the event.

This resolution shall take effect immediately upon its adoption.

a town for a lifetime
IRONDEQUOIT New York

Scott Peters, IPD

Jeffrey David, Fire Marshal

Erin Magee, DPW Commissioner

To: Distribution

From: Melissa Rhoads, Clerk's Office

Date: 01/08/2026

Re: Shamrock Jacks St Patrick's Day Festival/Celebration

Chief,

Please read the attached Special Event, Block Party, and Sound Amplification application for the 2026 Shamrock Jack's St. Patrick's Day Festival. It requires your review and approval. Please review, approve/deny and forward interoffice mail to Jeffrey David in the Fire Marshall's Office.

Jeffrey,

Please read the attached Special Event, Block Party, and Sound Amplification application for the 2026 Shamrock Jack's St. Patrick's Day Festival. It requires your review and approval. Please review, approve/deny and forward interoffice mail to Erin Magee in the Department of Public Works Department.

Erin,

Please read the attached Special Event, Block Party, and Sound Amplification application for the 2026 Shamrock Jack's St. Patrick's Day Festival. It requires your review and approval. Then please send it back to me in interoffice mail.

Thank you!

Attachment: Special Event, Block Party and Sound Amplification applications

Event Name: Shamrock Jack's St. Patrick's Day Celebration/Festival

Event Date: 03/13/26-03/17/26

Time: 09:00 AM – 10:30 PM

Place and Address: Shamrock Jack's, 4554 Culver Rd

Also received payment for Sound Amp ($25) + Block Party ($25) Total: $50.00 ck #5173 (M)

$150.00 Application Fee

ck 5172 Date Received: 1/8/26 By: (M)

Insurance Approval: 1/13/26 see attached email (M)

Fire Marshal Approval :

Signature

1.14.26
Date

Police Department Approval :

Signature

01/09/2026
Date

Department of Public Works:

Signature

1/16/26
Date

Security Deposit (If Applicable)

Amount Taken:_____
Received by:_____
Date Received:_____

March 24, 2004

SHAMROCK JACK'S ST PATTY'S DAY 2026

NEW LOCAL LAW

APPLICATION FOR LICENSE TO CONDUCT FESTIVALS/CARNIVALS/EVENTS

NOTE: This application is pursuant to Town of Irondequoit Municipal Code, Chapter 194, "Special Events", attached.

If any sectio n is not applicable to your event, please put N/A in lieu of leaving it blank.

GENERAL:

Name of Applicant: Shamrock Jacks LLC

Applicant's Address: 4554 Culver Rd

Telephone Number: 585 - 439. 9288

If Corporation, list State of Incorporation: _____

Corporation Officers' Addresses: _____

_____

Type of Event Planned: St. Patricks Festival / Celebration

Event Site Address: 4554 Culver Rd.

Location of Nearby Residents : (ATTACH A MAP SHOWING ALL RESIDENTIAL LOT LINES WITHIN 150 FEET OF EVENT SITE).

Name of Outside Contractor (or Concessionaire): _____

_____

Contractor Residence Address (Local): _____

Contractor Telephone No.: _____

Contractor Business Address: _____

Contractor Business Telephone No.: _____

Names of Contractor Employees: _____

_____

(If additional space is needed, please list on reverse side of this sheet.)

If employees are housed on event site, state in what manner: _____

_____

Type and number of contractor rides/concessions/exhibitions to be used (Locate on map):

POWER:

Type of electrical power to be used (house current, generator, etc.): Generators, House Power

Location of generator on event site (Locate on map): Behind 160 Sea View and 4554 Culver Road

Type of lighting to be used (If searchlight is planned, indicate size and site location):

String lights in tent

PARKING/TRANSPORTATION:

Storage location of trailers and trucks (indicate on map):

Parking location of workers and patrons ' vehicles (indicate on map):

Street route to be used to transport equipment/rides to and from event site:

Sea View Dr.

Nature and scope of event advertising: Social Media

Statement of method used by applicant and/or outside contractor to supervise parking/traffic flow: Signage, Employees w/vests for Traffic Control

IF YOUR EVENT UTILIZES ANY OF THE ROADS LISTED BELOW YOU MUST GET APPROVAL FROM THE RESPECTIVE JURISDICTIONS.

SURETY:

Applicant must file with Town Clerk, upon approval of application but prior to issuance

of license, the following:

CERTIFICATE OF LIABILITY INSURANCE insuring the licensee and the Town of Irondequoit for a minimum of $1,000,000 Combined Single Limit for Bodily Injury and Property Damage Liability, including Products and Completed Operations Coverage, arising out of the licensed activity.

NOTE: The Town of Irondequoit must be listed on a primary and non-contributory basis.

EVENT OPERATING SCHEDULE : (Maximum of 5 days from 8:00 AM to 12 Midnight only).

Equipment/rides set up start date 3/10/26 Time 8:00 A.M.

Event Start Date 3/13/26 Time 3:00 P.M.

Event Completion Date 3/17/26 Time 10:30 P.M.

Equipment/rides take down date 3/18 - 3/19/26 Time 8:00Am. - 4:00 pm.

RESPONSIBLE PARTIES:
Person or alternate located on event site and responsible for all event activities during its operations:

NAME Scott Petzing
ADDRESS 4554 Culver Rd
TELEPHONE NO. 585-439-9288

NAME Mike Petzing
ADDRESS 4554 Culver Rd
TELEPHONE NO. 585-323-9310

Date of Application: 1-7-26

Signature of Applicant:

*PLEASE NOTE: IT IS THE RESPONSIBILITY OF THE APPLICANT TO PROVIDE THE TOWN CLERK 'S OFFICE WITH A COMPLETED LICENSE APPLICATION AND PROPER INSURANCE REQUIREMENTS AT TIME OF SUBMITTAL. INCOMPLETE APPLICATIONS WILL NO LONGER BE ACCEPTED.

Name of Event: St. Patricks Day

FOR TOWN USE ONLY: Festivals / Carnivals / Events

Roadway Jurisdiction

City

Longacre Rd	(south of southside median curbline)
Seneca Avenue	(west side, south of Longacre)
Wisner Rd	(maintained by TOI)
Hoffman Rd	(Culver Rd to Wisner- maintained by TOI)

County

Bay Front South	(Glen Haven to Orchard Pk Blvd)
Cooper Rd	
Culver Rd	(Norton to 590)
Durand Blvd	(Culver to Seabreeze Dr)
East Ridge Rd	(City to 590)
Hudson Ave	
Lakeshore Blvd	
North Goodman St	
Norton St	
Pattonwood Dr	
Portland Ave	
St. Paul Blvd	
Seneca Ave	(Long Acre to Titus)
Kings Hwy N	
Kings Hwy S	
Sweet Fern Rd	
Thomas Ave	
Titus Ave	(St. Paul to Seabreeze Dr)
Winton Rd	(City to Empire)

State

Empire Blvd

By signing this form, you are stating that you will get approval through the appropriate jurisdiction.

Signature: _____ Date: 1-7-2026

*Please attach any approval letters that you receive

TOWN OF IRONDEQUOIT

"Where the land and waters meet." Est. 1839

IMDEMNIFICATION AND CONTRIBUTION AGREEMENT

To the fullest extent permitted by law, Contractor agrees to indemnify, defend Town of Irondequoit any and all losses, claims, actions, demands, liabilities, or expenses, including but not limited to attorney's fees and all other costs of defense, by reason of the liability imposed by law or otherwise upon Town of Irondequoit for damages because of bodily injuries, including death, at any time resulting therefrom, sustained by any persons, including Contractor's employees, or on account of damages to property, including loss of use thereof, arising directly or indirectly from the performance of Contractor's work or from any of the acts or omissions on the part of Contractor, its employees, agents, representatives, materialmen, suppliers, and/or subcontractors. If such indemnity is made void or otherwise indemnity permitted by law, so as to require indemnification, in whole or in part, to the fullest extent permitted by law.

Contractor shall strictly observe and comply with all safety laws, rules and regulations (including but not limited to the Federal Occupational Safety and Health Act, the New York Labor Law, and all regulations promulgated pursuant to such laws) and to provide such protection as necessary to protect its workers and the workers of other contractors. In the event that additional safety measures are required. Contractor agrees that it will install or procure such additional safety measures at its sole expense. To the fullest extent permitted by law, Contractor shall hold harmless, indemnify and defend Town of Irondequoit against all losses, claims, fines or expenses, including but not limited to attorney's fees, resulting from the enforcement of these laws and related acts of its officers, employees, subcontractors, suppliers, and materialmen.

1-7-26
Date

Shamrock Jacks LLC
(Individual or Company Name)

By _____
Signature

Scott Petrins
Print Name and Office

SHAMJAC-02 SSMITH

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 1/20/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Paris-Kirwan Associates, Inc. PO Box 40420 Rochester, NY 14604	CONTACT NAME: PHONE (A/C, No, Ext): (585) 473-8000 FAX (A/C, No): (585) 340-1714 E-MAIL ADDRESS: reception@paris-kirwan.com
INSURED Shamrock Jacks LLC 4554 Culver Road Rochester, NY 14622	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : Chautauqua Patrons Ins Assoc INSURER B : Travelers Indemnity Company — 25658 INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	$ 2,000,000
	CLAIMS-MADE X OCCUR	X		305256007	10/4/2025	10/4/2026	DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 50,000
	X Liquor Liability						MED EXP (Any one person)	$ 5,000
							PERSONAL & ADV INJURY	$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 4,000,000
	POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 4,000,000
	OTHER:							$
A	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS			305256007	10/4/2025	10/4/2026	BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB / OCCUR						EACH OCCURRENCE	$
	EXCESS LIAB / CLAIMS-MADE						AGGREGATE	$
	DED / RETENTION $							$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						X PER STATUTE / OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N: Y	N / A		UB6Y03428A	7/1/2025	7/1/2026	E.L. EACH ACCIDENT	$ 100,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$ 100,000
							E.L. DISEASE - POLICY LIMIT	$ 500,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Town of Irondequoit is included as additional insured status including ongoing and completed operations on a primary and non contributory basis when required in written contract or agreement

RE: St Patrick's Day Event held March 8, 2026 to March 21, 2026. The insured closes off the parking lot and puts tents and heaters up outside to accommodate more guests. They have special Irish dinners & lunches and some live music.

CERTIFICATE HOLDER

Town of Irondequoit
1280 Titus Ave
Rochester, NY 14617

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Laurese Stanney

ACORD 25 (2016/03)

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Town of Irondequoit
1280 Titus Ave
Rochester, NY 14617

January 07 2026
To whom it may concern:

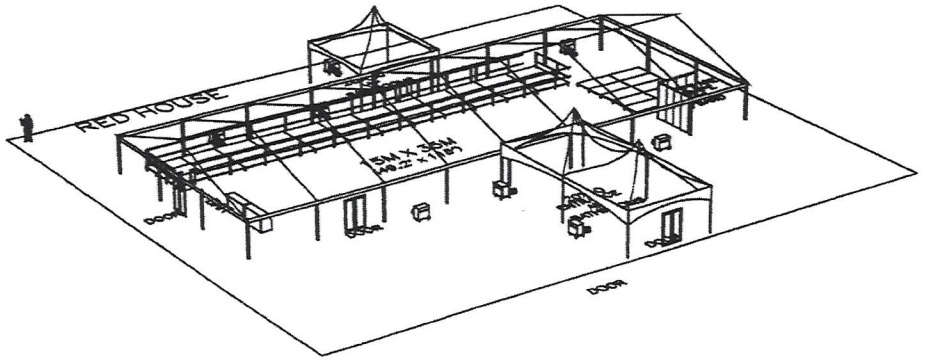
Shamrock Jacks LLC would like to submit a letter of intent for our annual St. Patrick's Day festivities. This year we are looking to put up a tent in both parking lots going over Sea View Avenue. We have submitted the standard forms including the certificate of liability insurance naming the Town of Irondequoit as a certificate holder.

We are also including a map of proposed tent location. If there is any more information needed, please feel free to contact us.

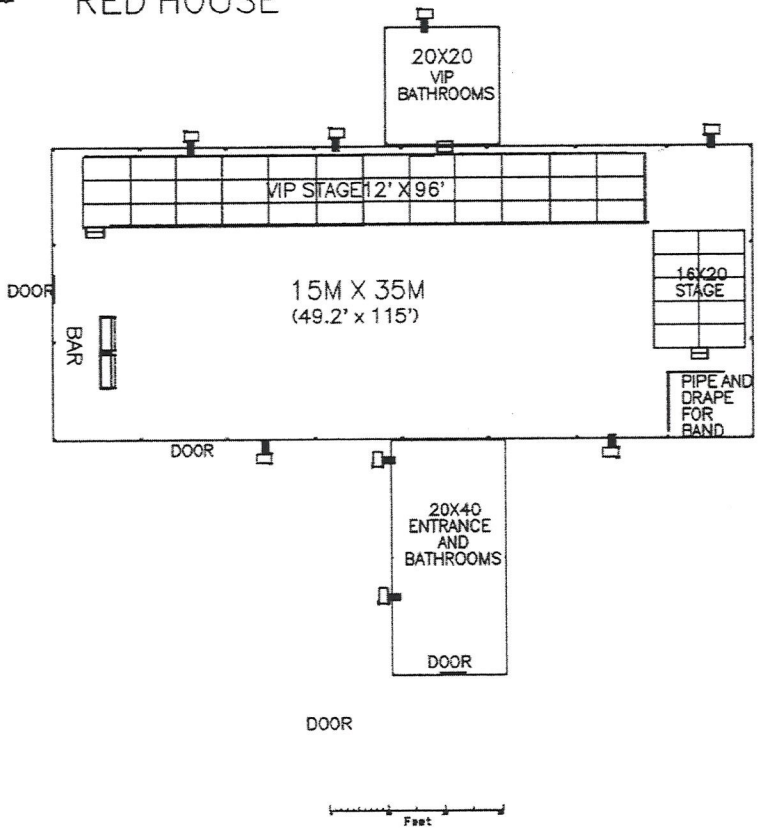
Sincerely,



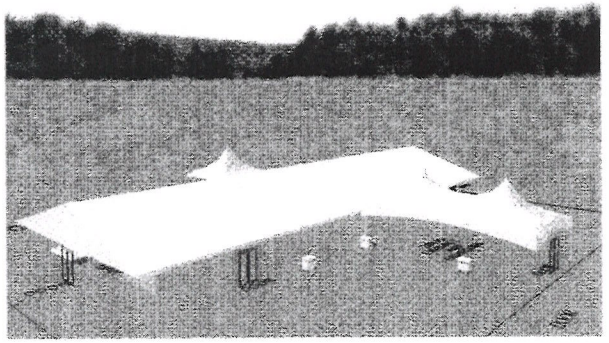
Scott Petzing
Shamrock Jacks
(585) 439-9388
Scottpetzing@gmail.com



RED HOUSE



Shamrock Jack's St. Patrick's Day



McCarthy Events

Certificate of Flame Resistance

Date Manufactured

10/29/2021

AZTEC TENTS
2665 COLUMBIA ST
TORRANCE, CA 90503
(800) 228-3687

Invoice Number: 0252213-IN
Customer P.O.:
Customer Number: MCMA145

This is to certify that the materials described below have been flame retardant treated (or are inherently flame retardant).

McCarthy Tents And Events

McCarthy Tents And Events
3353 Brighton Henrietta
Townline Road
Rochester, NY 14623

Certification is hereby made that the articles described below hereof are made from a flame-retardant fabric or material registered and approved by the California State Fire Marshal for such use. The fabric has been tested and passes the following standards: NFPA 701 Large Scale, UK BS7837:1996 (2015), Canadian-CAN/ULC S109-03, European M2 . See chart to right for trade name of flame-resistant fabric or material used and additionally referenced on the label of the fabric panel.

Vendor	Trade Name	CA Cert. #
Bruin	Mardi Gras	F-222.02
Bruin	Mesh	F-222.04
California Comb.	Lam-Tex 12, 14, 16, 18oz	F-419.01
Coated Fabrics	Clear Vinyl 16ga / 20ga	F-570.02
DAF	Clear Vinyl 16ga / 20ga	F-593.01
DAF	DAF	F-593.02
Exclusively Expo	PolySateen Liner	F-434.01
Ferrari	Precontraint 502	F-444.01
Ferrari	Precontraint 702	F-444.08
Phillips Textiles	Phil-Tex Liner	F-500.01
PVC Tech.	Deco Cloth / Veion	F-504.01
Snyder	Weatherspan	F-140.01
Tri Vantage	Firesist Sunbrella	F-368.05
Tri Vantage	Patio 500	F-121.02
Tri Vantage	Big Top	F-121.10
Tri Vantage	Vanguard Weblon	F-069.01
Tri Vantage	Weblon / Coastline	F-069.01
Verseidag	Duraskin B1673, B1515	F-530.01

THE FLAME RETARDANT PROCESS USED WILL NOT BE REMOVED BY WASHING

Eric Lee
Name of Applicator or Production Superintendent

General Manager- Manufacturing
Title of Applicator or Production Superintendent

ITEM CODE	ITEM DESCRIPTION	UNIT	ORDERED	PRODUCED
Z459G1502	15m Uniflex(P3) B/O Gable Panel Verseidag B1673 Blockout White Keder Connection- Rail not included	EACH	2	2
Z459155.002	15mx5m Uniflex(P3) B/O Roof Panel Verseidag B1673 Blockout White	EACH	5	5
Z451G0302	3m Multiflex(P8) B/O Gable Panel Verseidag B1673 Blockout White Zipper Connection	EACH	4	4

Certificate of Flame Resistance

Date Manufactured

12/16/2022

AZTEC TENTS
2665 COLUMBIA ST
TORRANCE, CA 90503
(800) 228-3687

Invoice Number: 0256824-IN
Customer P.O.:
Customer Number: MCMA145

This is to certify that the materials described below have been flame retardant treated (or are inherently flame retardant).

McCarthy Tents And Events

McCarthy Tents And Events
3353 Brighton Henrietta
Townline Road
Rochester, NY 14623

Certification is hereby made that the articles described below hereof are made from a flame-retardant fabric or material registered and approved by the California State Fire Marshal for such use. The fabric has been tested and passes the following standards: NFPA 701 Large Scale, UK BS7837:1996 (2015), Canadian-CAN/ULC S109-03, European M2 . See chart to right for trade name of flame-resistant fabric or material used and additionally referenced on the label of the fabric panel.

Vendor	Trade Name	CA Cert. #
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Bruin	Mesh	F-222.04
California Comb.	Lam-Tex 12, 14, 16, 18oz	F-419.01
Coated Fabrics	Clear Vinyl 16ga / 20ga	F-570.02
DAF	Clear Vinyl 16ga / 20ga	F-593.01
DAF	DAF	F-593.02
Exclusively Expo	PolySateen Liner	F-434.01
Ferrari	Precontraint 502	F-444.01
Ferrari	Precontraint 702	F-444.08
Phillips Textiles	Phil-Tex Liner	F-500.01
PVC Tech.	Deco Cloth / Velon	F-504.01
Snyder	Weatherspan	F-140.01
Tri Vantage	Firesist Sunbrella	F-368.05
Tri Vantage	Patio 500	F-121.02
Tri Vantage	Big Top	F-121.10
Tri Vantage	Vanguard Weblon	F-069.01
Tri Vantage	Weblon / Coastline	F-069.01
Verseidag	Duraskin B1673, B1515	F-530.01

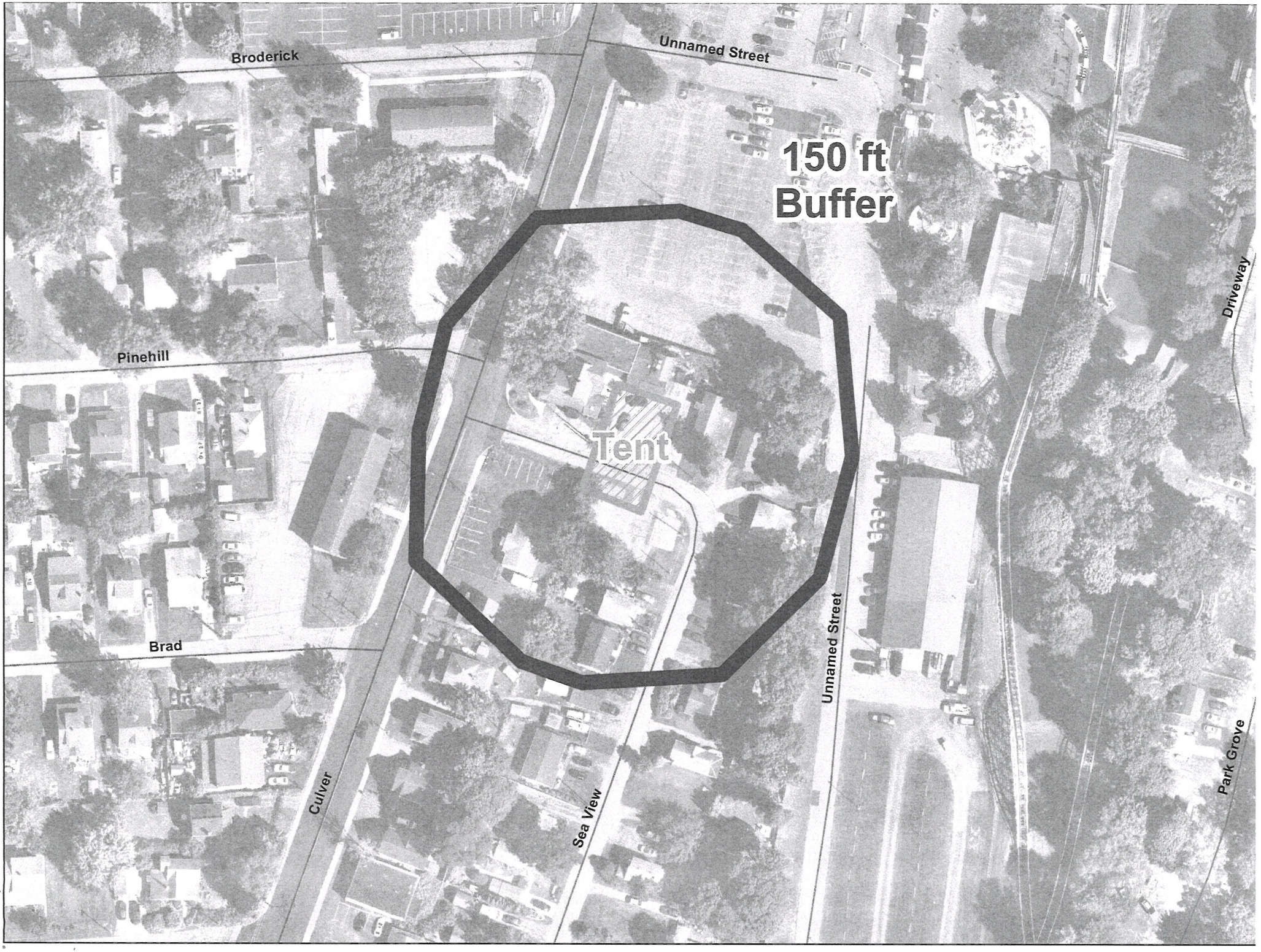
THE FLAME RETARDANT PROCESS USED WILL NOT BE REMOVED BY WASHING

Eric Lee
Name of Applicator or Production Superintendent

General Manager- Manufacturing
Title of Applicator or Production Superintendent

ITEM CODE	ITEM DESCRIPTION	UNIT	ORDERED	PRODUCED
Z22520FC2002	#20x20 1pc Festival Top UW w/ Ratchet Tensioners& Flag #SN4P Blockout White	EACH	10	10
Z22520FC3002	#20x30 1pc Festival Top UW w/ Ratchet Tensioners& Flag #SN4P Blockout White	EACH	8	8
Z22520FC4002	#20x40 1pc Festival Top UW w/ Ratchet Tensioners& Flag #SN4P Blockout White	EACH	8	8
Z22120GABLESUN	#20x Jumbotrac Gab End SUNBURST Sunburst Clear w/SN4P Blockout White Trim 1-End (2pc Split in Center) w/ 2 Ratchet Tensioners #Product Label & RFID tag needed on both halves	EACH	4	4
Z22120CM2002	20x20 Mid Jumbotrac Top UW SN4P Blockout White- w/ 2Ratchet Tensioners	EACH	6	6
Z22130GABLESUN	#30x JT/JT Lite Gab End SUNBURST Sunburst Clear w/SN4P Blockout White Trim 1-End (2pc Split in Center) w/ 3 Ratchet Tensioners #Product Label & RFID tag needed on both halves	EACH	8	8
Z22130CM1502	30x15 Mid JT/JT Lite Top UW SN4P Blockout White- w/2-Ratchet Tensioners	EACH	16	16
Z22140GABLESUN	#40x Jumbotrac Gab End SUNBURST Sunburst Clear w/SN4P Blockout White Trim 1-End (2pc Split in Center) w/ 3 Ratchet Tensioners #Product Label & RFID tag needed on both halves	EACH	8	8
Z22140CM2002	40x20 Mid Jumbotrac Top UW SN4P Blockout White- w/ 2Ratchet Tensioners	EACH	15	15

Continued


Broderick
Unnamed Street
150 ft
Buffer
Driveway
Pinehill
Tent
Brad
Unnamed Street
Culver
Sea View
Park Grove

SOUND AMPLIFYING EQUIPMENT APPLICATION

Applications must be submitted to the Town Clerk's Office **TWO (2) WEEKS PRIOR TO THE EVENT** along with payment of **$25.00** in the form of cash or check. NOISE LEVELS SHOULD BE KEPT AT A LEVEL AS SPECIFIED IN TOWN CODE, CHAPTER 160 - NOISE.

EXCESSIVE NOISE WILL RESULT IN POLICE ACTION.

Owner of Equipment

Name Stellar Sound Productions LLC

Address 6428 Hidden Acres

City/St/Zip Livonia, NY 14487

Telephone No. 585 - 734-5586

User of Equipment

Name Shamrock Jacks LLC

Address 4554 Culver Rd

City/St/Zip Rochester, NY 14622

Telephone No. 585 - 439-9288

Location to be Used (Commercial) **Residential**

Name of Resident Shamrock Jacks LLC

Address 4554 Culver Rd

Telephone No. 439-9288

Date and Rain Date 03 13 2026 - 03 17 2026
month day year / month day year

TIME: **START** 9 AM **UNTIL** 10:30 pm

HAVE ALL AFFECTED RESIDENTS BEEN INFORMED? yes

Maximum sound producing power of the sound amplifying equipment:

Wattage to be used 110/120

Volume in decibels of sound which will be produced 15

License number of sound truck (if applicable) _____

General description of sound amplifying equipment which is to be used: _____

(for Town use only)
Fee Collected: #25 Date: 1/8/26 By: (M) Type: Check # 5173
Police Dept._____ Approved_____ Denied_____ Date_____

Town Clerk_____ Approved _____Denied_____ Date_____
(01/2025)

Check payment
#25.00
ck # 5173
1/8/26

TOWN OF IRONDEQUOIT
APPLICATION FOR BLOCK PARTY

- Applications must be submitted to the Town Clerk's Office **TWO (2) WEEKS PRIOR TO THE BLOCK PARTY with $25.00 payment.**
- A driving lane of at least **TWELVE (12) FEET** must be kept open within the closed area at all times for emergency vehicles access.
- Use of only light weight barricades, which can easily be removed in case of an emergency. **NO VEHICLES MAY BE USED AS A ROAD BLOCKING DEVICE.**
- Noise levels should be kept at a Level in keeping with the Town Ordinance #84-4. **EXCESSIVE NOISE WILL RESULT IN POLICE ACTION.**

Applicant Name: Shamrock Jacks LLC Daytime Phone #: 585-439-9288
Applicant Address: 4554 Culver Rd Evening Phone #:
CONTACT PERSON (IF DIFFERENT FROM ABOVE):
Name: Scott Petzing Daytime Phone #: 585-439-9288
Address: 101 Armstrong Ave Evening Phone #:

Scheduled Date: (Month) March (Date) 10-19 2026
Rain Date: (Month) (Date)
Time: From: 9:00 AM To: 10:30 pm
Location of Block Party: 4554 Culver Rd
Area to be blocked off? ☒ Yes ☐ No
If Yes, specify: Blocked off on Sea View Ave between 160 Sea View and Culver Rd Intersection
Request for barricades from Highway Department: ☒ Yes ☐ No
If yes, the Highway Department will deliver barricades the night before event.
Approximate number of participants: 600

ALL AFFECTED RESIDENTS MUST BE NOTIFIED OF BLOCK PARTY

Have all affected residents been notified? ☒ Yes ☐ No
If no, number informed:
Names and addresses of residents opposed to activity (Attach separate sheet if necessary)
Name: Address:
Name: Address:
Bus Route clearance received (if applicable): ☐ Yes ☐ No
Bus rerouting must be cleared **by applicant** with the Regional Transit Systems

The police department offers a service where a police officer comes to your block party, to be introduced to your neighbors, barring a police emergency. The officer will bring "goodie" bags to hand out to the children, have the patrol car on display.And answer any questions the residents might have. If you have any further questions about this program, please call 336-6000 x2287.

☐ I am interested in having a police officer visit our block party. Preferred time:
☐ Thank you, but we are not interested in participating in this program.

For Town Use Only:
TOWN CLERK APPROVAL: DATE:
POLICE APPROVAL: DATE: 01/09/2026
FIRE MARSHAL APPROVAL: DATE: 1-14-26
DPW COMMISSIONER APPROVAL: DATE: 1/14/26
OF INTERSECTIONS/BARRIADES NEEDED: DATE:

Please Sign:

Melissa Rhoads

From: Susan Lamanna <susanlam@paris-kirwan.com>
Sent: Tuesday, January 13, 2026 4:10 PM
To: Melissa Rhoads
Subject: RE: Shamrock Jacks Insurance

Hi Melissa,

No problem, thank you for getting back to me. This looks good and approved.

Susan Lamanna
Commercial Account Representative
Paris-Kirwan Associates Inc.
255 East Ave, Suite 300
Rochester, NY 14604
585-461-6436 phone
585-340-1714 fax
susanlam@paris-kirwan.com

Please note my office hours are 7:30-4:00 M-Thurs and 7:30- 2:45 on Fridays.

From: Melissa Rhoads <mrhoads@irondequoit.gov>
Sent: Tuesday, January 13, 2026 1:07 PM
To: Susan Lamanna <susanlam@paris-kirwan.com>
Subject: FW: Shamrock Jacks Insurance

Hello Susan! Here are the requested documents from Shamrock Jack's. I'm about to print them for our records, please let me know if you would prefer, that I scan them to you all in one file (I can also scan the whole packet together again).

Please let me know if you need anything else, or if this event is approved/denied. Thanks Susan!

Melissa Rhoads
Town of Irondequoit – Clerk's Office
1280 Titus Ave
Rochester, NY 14617
(p) – 585-467-8840