

Downtown San Luis Obispo Parking Technology Roadmap

Prepared for the
City of San Luis Obispo
October 10, 2024

Table of Contents

Executive Summary.....	1
Introduction	2
Purpose	2
Background	2
Study Area.....	3
Technology Roadmap	5
Current Parking Technologies	5
Parking Access Revenue Control System (PARCS)	5
Pay Stations.....	6
Single-space Meters	7
Revenue Collection and Reconciliation.....	8
Mobile Payment Applications.....	8
Validations.....	9
License Plate Recognition (LPR)	9
Digital Parking Occupancy Signs	10
Data Collection and Analysis	11
Citation and Permit Management System (CPMS).....	11
Signage	13
Electric Vehicle Chargers (EVC).....	14
Technology Vendor Contracting	14
QR Code Scams	15
Garage Security.....	15
Summary of Recommendations.....	17
Appendix A - Community Outreach Summary.....	20
Appendix B - PARCS Performance Standards	35

Attachments

Attachment 1: Parking Access Revenue Control System Scope of Work

Attachment 2: Pay Stations Scope of Work

Attachment 3: Mobile Parking Payment Application RFP

Attachment 4: Citation and Permit Management System Scope of Work

Attachment 5: Data, System, and Integration Requirements Scope of Work

October 10, 2024

Executive Summary

This Downtown San Luis Obispo Parking Technology Roadmap (“Roadmap”) evaluates the parking technology and operating systems currently utilized in the City of San Luis Obispo (“City”) as of the publication date of this report. Dixon Resources Unlimited (“DIXON”) was retained by the City’s Parking Division to prepare this Roadmap following the completion of the Parking Rate Study in May 2024. The Roadmap is a living document that summarizes what has been accomplished so far as it relates to the City’s parking program following the Parking Rate Study and the City Council meeting in May 2024, and aims to act as a resource guide for the City to achieve a cohesive parking system that can be managed effectively and with ease by City staff. This report identifies the current challenges in the parking program as well as opportunities for improvements that address the different parking technologies, the accompanying processes, and organizational needs for the City’s parking program. The roadmap takes a comprehensive approach by examining each component both individually and as it relates to the whole system, aiming to connect the dots and show how the parking program can evolve to be one that is easy, convenient, and accessible for residents and visitors alike.

The City has a robust parking program in the Downtown area that consists of a wide array of parking technologies, including multi-space pay stations, single-space meters, mobile payment applications, LPR cameras, and permitting systems across 1,306 on-street spaces, and 1,255 public off-street spaces. However, the City has run into an increasingly high number of issues related to the technology systems and vendors, including limitations in software integrations, administrative challenges, inability to conduct consistent parking enforcement, inadequate vendor support response times, hardware issues, and general discontent from the public regarding the accessibility and ease of using the parking technologies in the City. The Roadmap is meant to equip the City with the proper resources to be able to solicit parking technology vendors, with the detailed specifications and scope of work (SOW) included as attachments to this report, which were shared with the City between June and September 2024. The SOWs developed for this Roadmap were directly informed by the numerous discussions that were held between different City staff who engage parking in order to determine the needs, wants, and desires as it relates to parking in San Luis Obispo.

In addition to the goal of meeting the community’s parking needs and creating a convenient and simple parking experience, the recommendations outlined in this Roadmap are also motivated by the goal of streamlining administrative processes within the City’s Parking Program. Adopting these recommendations could potentially lead to significant cost savings and enhanced efficiency for City staff. The proposed technological upgrades and parking operations improvements are designed not only to optimize internal operations but also to improve the overall parking experience for residents and visitors of San Luis Obispo. With more efficient administrative workflows and better-integrated parking technology systems, the City can offer a more seamless and user-friendly parking experience, ultimately contributing to greater satisfaction and convenience for the community.

Introduction

Purpose

This Roadmap was developed by DIXON for the City of San Luis Obispo to assess the current parking technologies and operations in the City, as well as to prepare scopes of work (SOW) for parking technologies that the City is looking to upgrade and/or replace. The Roadmap assesses the following elements in the City's parking program:

- Parking Access Revenue Control Systems (PARCS)
- Pay Stations
- Single-space Meters
- Mobile Payment Applications
- Citation Management Systems
- Permit Management Systems
- License Plate Recognition (LPR)
- Data Integration
- Signage
- Electric Vehicle Chargers (EVCs)

This Roadmap summarizes the findings for the assessment of the above parking technologies and operations, and is an extension of the Parking Rate Study Report that was completed in May 2024. The Roadmap aims to provide the City with guidance on building a cohesive and effective parking technology ecosystem, with the goal of improving efficiency and future-proofing the City's parking program. The specifications for parking technology included in this Roadmap may be used by City staff to help guide and inform the release of Request for Proposals (RFP) of various technologies, that is slated to be approved at City Council in November 2024.

Background

On May 14, 2024, City staff brought a set of recommendations regarding parking rate models and operations to City Council for discussion and direction. The Council agenda report drew upon the findings and rate model options provided by the Parking Rate Study Report. Council unanimously approved the decision to adopt a draft Ordinance and Resolution to pursue rate changes, including eliminating the first hour free in parking structures and re-establishing paid parking in structures on Sundays. In addition to the rate changes, Council also approved the decision to pursue several operational changes recommended by staff, which included the expansion of the on-street time limit from two to three hours, reinstating a gated parking system at the current gateless structure (842 Palm Street), and reducing the current multi-vendor mobile payment applications approach to a single-vendor approach. The recommendations in this Roadmap are meant to support and inform these Council-approved changes.

Community engagement was prioritized as part of the Parking Rate Study and feedback was collected from various channels, including a survey, social media, community meetings, and emails. General themes that emerged include challenges related to technology and payment methods, safety improvements desired in parking garages, calls for rate reductions and

maintaining free parking periods, concerns regarding transparency in recent changes, worries about the impact on locals, visitors, and businesses, and suggestions to reduce evening parking hours. As part of the Technology Roadmap, DIXON conducted Needs Assessment Interviews with City staff who are involved in parking enforcement, citation and permit management, administration, and purchasing were interviewed in order to help identify the current challenges and needs as it relates to parking. In addition to the internal interviews, DIXON and Parking Division staff met and continue to meet on a weekly basis to assist with vendor contract reviews, communications with current and potential vendors, dissecting current operational procedures, discussing current parking legislation, policies, and trends, and supporting staff with any other parking-related topics as needed.

The recommendations in this Roadmap are informed by the community outreach efforts from the Parking Rate Study, the needs assessment interviews conducted for the Technology Roadmap, and the consistent discussions held between DIXON and City staff throughout the development of both the Parking Rate Study and Technology Roadmap. This Roadmap aims to capture the City's desired direction for parking in Downtown SLO as comprehensively as possible, with the goal of establishing a more cohesive parking technology ecosystem. A full summary of the community outreach and internal needs assessment process can be found in Appendix A.

Study Area

This Roadmap has been developed to address parking technology in Downtown SLO. Figure 1 shows the Study Area.

Figure 1. Downtown San Luis Obispo Study Area



The City operates three off-street parking structures, with one new facility, the Cultural Arts District Parking Structure (CADPS), currently under construction. This new structure will be located on the corner of Palm, Nipomo, and Monterey Streets, and is slated to be completed by the beginning of 2026.

Table 1. Off-Street Parking Facilities

Parking Facility	Inventory Count
842 Palm Street	415
919 Palm Street	240
871 Marsh Street	577
CADPS (under construction)	397

Technology Roadmap

Current Parking Technologies

The table below summarizes the current parking technology ecosystem in the City. Each technology is described in detail in the sections that follow.

Table 2. Current and Past Parking Technologies

Technology Provider	Use
HUB	PARCS
	Daktronics digital parking occupancy signs
Route 1	Genetec FreeFlow fixed mount and mobile LPR
IPS	Citation and permit management systems
	On-street pay stations
	On-street meters
	Mobile payment application (Park Smarter ¹)
CurbTrac ²	Mobile payment application aggregator
HONK	Mobile payment application
ParkMobile	Mobile payment application
PayByPhone	Mobile payment application
ChargePoint	Electric vehicle chargers (EVC)

Parking Access Revenue Control System (PARCS)

The City currently operates HUB equipment at two existing parking structures (871 Marsh St & 919 Palm Street), and has a gateless system operated by IPS Group (IPS) and Genetec FreeFlow technology at the 842 Palm Street parking structure. The adoption of a gateless system at 842 Palm Street in June 2023 was intended to minimize delays and back-ups at the ingress and egress points, especially during special events like the Farmer’s Markets on Thursdays. However, the City has since faced several issues with the gateless design, including confusion among the community regarding how to pay for parking, and difficulties with enforcement as state legislation does not allow for parking citations to be mailed if a parker leaves the facility without payment.

Under Council direction, the City is proceeding with the reinstatement of a gated system at 842 Palm Street and conducted vendor demonstrations in June 2024 with the PARCS vendors. Following the virtual vendor demonstrations, vendors were invited to respond to a solicitation covering the scope of work outlined in Attachment 1.

In addition to reinstating a gated system at 842 Palm Street, Council also adopted a resolution as a part of the Parking Rate Study in May 2024 to implement a consistent gated solution across all the parking facilities. The City is contracting with Flash through the CADPS general contractor, Swinerton, to purchase PARCS equipment for the new facility and consistent with the adopted resolution this is justification to sole source the technology for the other three existing parking facilities. Installation of the new PARCS technology should be expedited upon

¹ Park Smarter is temporarily discontinued.

² City had plans to terminate CurbTrac in May 2024, but has reopened a month-to-month contract as of August 7, 2024 to keep continuation of services due to a delay in mobile integration with IPS.

Council approval at 842 Palm Street given the urgency of replacing the existing gateless system.

Since the contract for PARCS equipment will be through Swinerton, the City must lay out strict performance standards and measures covering installation, software requirements, support services, transaction fees, monthly fees, integration requirements, permit management, and warranty terms to ensure that the sole sourcing process for the other parking facilities will be streamlined with an extensive contract that the City can replicate. The City is currently vetting a funding source for the purchase of PARCS at the three existing parking facilities. City staff have identified unaccounted interest revenue in the current fiscal year budget for bonding from CADPS, which is believed to be sufficient to cover the costs of purchasing PARCS for the existing parking facilities.

Included in Appendix B are suggested performance standards and measures for a PARCS technology contract.

Pay Stations

The City currently utilizes IPS multi-space pay stations for their on-street and off-street parking locations. There are a total of 64 pay stations currently deployed in the Downtown core, with 57 of them being MS1 models, and 7 being MS3 models. The MS1 models are aging and currently out of warranty, and due to their age, it is increasingly difficult for City staff to locate and procure operating and spare parts as IPS has stopped selling the MS1 models. Although the MS3 pay stations are a newer model, the City has faced communication issues with the pay stations which has resulted in disruptions in parking enforcement operations and in turn a significant loss of paid parking revenue. The City has purchased 27 MS3 pay stations to date, 5 of which are installed in the 842 Palm Street Garage as pay-on-foot stations, but only 7 remain installed on-street, while 15 MS3 pay stations are not in use. City staff are evaluating potential opportunities to be able to return the MS3 pay stations to IPS and receive a refund, which would in turn dictate the funding methodology for the new pay stations to be purchased from the chosen technology provider. With the new pay station provider, the City would need to replace the MS1 pay stations, MS3 pay stations, and any additional pay stations that need to be installed in order to phase out the single-space meters in some of the on-street locations.

In addition to the issues with the pay station hardware, City staff have faced difficulties with the vendor in receiving adequate support services, which has caused frustration for both City staff and for the public, as well as operational delays in the City's parking program. Performance standards regarding vendor response times are built into the SOW (see Attachment 2) to ensure that the selected technology provider is able to provide support to the City in a consistent, predictable, and timely manner.

To promote a parking experience that is easy to navigate, the City should ensure that placement of on-street pay stations are recognizable and predictable in all parts of Downtown. For example, pay stations could be located at the corners of every block, or perhaps mid-block. Combined with proper parking signage, continuity in pay station placement can help drivers easily identify paid parking locations, and ensure they have sufficient time to make their payments within the grace period. While the placements of the existing pay stations are adequate for the time being, the City would need to re-evaluate the placements before the

new pay stations are installed as there is a significant amount of street clutter currently in the Downtown area, and the City has received complaints from the community regarding the placement of the paid parking equipment placements.

For the purposes of installing new pay stations, the City should consider the following general guidelines for placement of the equipment.

- **Parallel Parking Block** - One pay station shall service 8 to 10 parallel parking stalls located on a block face. Pay station to be located nearest to the center of the block.
- **Angled/Perpendicular Parking Block** - One pay station shall service 15 to 20 angled or perpendicular stalls located on a block face. Pay station to be located nearest to the center of the block.
- **Additional Pay Station per Block** - One additional pay station may be added to a block face to provide service for every additional group of 2 to 10 parallel parking stalls or 2 to 20 angled/perpendicular parking stalls on a block face. Each pay station to be located nearest to the center of each group of stalls.
- **Corner Placement** - Corner placement of pay station may be considered depending on the store front make up, length of block, and flow of pedestrian traffic.
- **Street Crossing** - A customer shall not have to cross traffic in order to access a pay station.
- **Mobile Payment Supplement** - Mobile payment and related signage may supplement or replace an additional pay station installation, especially on block faces with 11 to 17 parallel parking stalls or 16 to 39 angled/perpendicular stalls. In this case, easily identifiable signage should be placed along the block face every 2 to 4 parallel parking stalls or 4 to 6 angles/perpendicular parking stalls.

Should it become necessary for the City to remove the remaining IPS MS3 pay stations, these standards can be utilized to determine any changes that might be needed due to the removal. For example, when an MS3 is removed, an adjacent MS1 pay station may be moved to service as many stalls as possible. Additionally, an MS1 pay station from a low volume block or a location where it services a low number of stalls could be moved to the MS3 location. Finally, mobile payment can be considered to cover a block where an MS3 is removed, especially if an existing MS1 is nearby. In this case, the City should ensure enough signage is placed making it easy for a customer to identify a way to pay.

Single-space Meters

With the intention of heading toward an infrastructure-lite parking program and minimizing operational costs, City Council has directed single-space meters to eventually be phased out of the Downtown core. In the interim, the City will continue to lease single-space meters from IPS, with the intention that all meters will eventually be replaced with multi-space pay stations, supported by alternative payment methods including mobile payment applications and pay by text. Since most of the 10-hour on-street spaces are generally occupied by permit holders who do not use the single-space meters, installing pay stations instead will introduce cost savings on single-space meter fees.

Once the City decides to stop leasing the single-space meters, a review of the leasing contract with IPS should be completed to fully understand all post-lease terms and equipment return

procedures. Further, a discussion with the vendor should occur which results in specific documented guidelines addressing the conditions of where costs may apply. An assessment can then be completed that includes the potential costs as related to the specific equipment in the City's possession. Based on the results, the City may wish to consider options to determine the most advantageous position. This may include a lease buy out, negotiating with the vendor, or simply returning the equipment.

Revenue Collection and Reconciliation

The City currently outsources revenue collection with FS Collections on a month-to-month basis and armored courier services with Garda on a year-to-year basis for the coin and cash collected by the Parking Enterprise Fund, which includes revenue from the parking meters, off-street garages, and Parking Services front counter. The City intends to continue outsourcing these processes. To enhance the revenue collection processes, the City should consider establishing process, procedure, and performance standards with the vendor, as well as internally between Parking Division and Finance Department staff to ensure City policies are followed accordingly. Documenting these standards can allow the City to better manage expectations and maintain a level of agreement between the City and contractor. While specifics relating to revenue collection and reconciliation processes are out of the scope of this Roadmap, it is recommended that the City conducts an additional assessment to re-evaluate the current operating procedures to build a more efficient revenue collection and reconciliation process, in addition to establishing the standards listed above.

Mobile Payment Applications

The City currently utilizes four different mobile payment applications (ParkMobile, PayByPhone, Honk, Park Smarter³), as well as a mobile payment application aggregator (CurbTrac). While the original intent of introducing multiple mobile payment applications was to offer flexibility for customers to pay for parking, the multi-vendor approach proved to be difficult for both the City and for the community, as it led to operational inconsistencies, limitations in promotional opportunities, and general confusion among the public on how to pay for parking. Another issue that surfaced from the multi-vendor approach was that it allowed parkers to take advantage of the first hour free by starting parking sessions in each of the mobile payment applications, since CurbTrac does not aggregate parking sessions by license plate. This meant that proper enforcement of paid parking sessions was difficult, resulting in a loss of paid parking revenue.

Reducing to a single mobile payment application could help simplify the paid parking experience, reduce sign blight and confusion, improve the administrative experience, reduce operational inconsistencies between vendors, streamline the facilitation of promotional campaigns such as in-app discount codes, and reduce expenses in terms of aggregator transaction fees. Currently, the City pays an additional transaction fee to the service that aggregates mobile payment app vendors.

³ Park Smarter is temporarily discontinued.

Under Council direction, the City is currently undergoing an RFP process to select a single vendor for their mobile payment application solution. The RFP requires that the vendor have experience working with the County of SLO, and includes the scope of work in Attachment 3.

Based on the final approved policies, the City should discuss opportunities to establish integrations between the new pay station provider and the mobile payment vendor to support the ability to extend parking sessions via mobile app for a more seamless and convenient parking experience.

Validations

The City is seeking a more effective way to manage parking validations, including an ability to have both City- and business-managed validations, juror parking validations, and special event validations that are issued digitally and can be managed via the selected mobile payment application or the PARCS platform. Parking validations are an effective way to welcome community members and visitors back to Downtown SLO to revitalize the commercial area and help foster a more welcoming environment. Parking validations can also incentivize customers to patronize businesses, which can help boost the economic vitality of Downtown SLO. Implementing a user-friendly, fully digitized system for issuing and managing parking validations can enable City staff to do so more effectively while also lifting the administrative burden through business-managed validations. Vendor specifications for validation opportunities are highlighted in the SOW for PARCS (Attachment 1) and mobile payment applications (Attachment 3).

In the short-term, while the garage is gateless, the City could consider working with the mobile payment vendor to introduce validation codes that could be provided to the juror upon arrival for use in on the mobile payment platform, thus eliminating the need for jurors to return to the parking structure once they check-in at the courthouse in order to start their parking session. Considering that not all jurors may have the ability to use mobile payment applications, the City may need to continue using temporary paper passes for jurors to display on their dashboard. However, it is recommended that the City digitizes their juror parking process as much as possible in order to streamline enforcement processes. Once the garage is gated, the City should consider working with the PARCS provider to establish a validation system that will allow jurors to park in the Palm Street Garage without cost.

License Plate Recognition (LPR)

Currently, there is a fixed-mount Genetec FreeFlow LPR system installed at the egress lane of 842 Palm Street garage to support the gateless design. With the transition to a gated system, the City has decided to remove the current LPR system at the egress lane and install a new LPR system provided by the new PARCS vendor at both the ingress and egress lanes (Figure 2). It is recommended that the City considers installing the same LPR system at the other two existing garages in order to ensure a cohesive technology system across all the off-street parking facilities. Installing LPR at the other two garages would help streamline enforcement operations and would also allow the City to have flexibility in any future operational changes such as potentially expanding the permit program beyond the 842 Palm Street garage.

The City should ensure that the LPR system is installed to allow for rear-plate capture, as many vehicles in California do not have a front license plate. To ensure license plates can be properly captured by LPR technology, the City may want to consider ways to control the ingress and/or egress of vehicles at the parking garages through infrastructure such as bollards. Since the City plans to install LPR at both the ingress and egress lanes for the three existing parking facilities, the lane configurations would need to be evaluated by engineers to ensure that the positioning of the LPR installation location allows for proper system operation.

The City's existing vehicle-mounted (mobile) LPR technology provided by Genetec is integrated with paid parking and citation management technologies to monitor for compliance based on license plate numbers, and it automates several manual enforcement processes to maximize efficiency and coverage. Integration with the existing mobile LPR technology will be a requirement for the new CMS and PMS vendor to ensure these enforcement processes can be maintained.

The current LPR system is set up in a way that requires all data to be hosted on the City's server, which has placed limitations on data storage, retention, and sharing capabilities. While the City does not have plans to change their LPR enforcement system or expand it at this time, the City should consider pursuing a cloud-based vendor-hosted storage system in the future that would allow for added flexibility in how LPR data is stored and managed, as well as providing the City with some cost savings.

Digital Parking Occupancy Signs

The City currently has Daktronics digital parking occupancy signs on the exterior of the three existing parking structures as part of the contract for PARCS with HUB from 2018; however, they have been inoperative since their installation due to a lack of proper integration with the current PARCS technology. Previously, City staff have done manual car counts and entered the parking occupancy into the system to update the digital signs, but due to its labor intensity, the digital signs have remained turned off for the most part.

With the new PARCS technology provided by Flash, it is recommended that the City requests the integration and ensure the existing digital parking occupancy signs are operational. Through the integrated PARCS and LPR system, the digital signs can be populated with real-

Figure 2. Fixed-mount LPR at 842 Palm Street



Figure 3. Existing Digital Occupancy Sign



time occupancy counts to display up-to-date information. This can improve the parking experience for Downtown visitors by enabling them to make simple and straightforward parking decisions and can also help increase utilization at the parking structures. Additionally, having digital signs at the parking structures can create a more cohesive, dynamic parking ecosystem that can improve circulation in the Downtown area and eliminate the need to circle the blocks in search of an available parking space.

Data Collection and Analysis

Ongoing data collection and evaluation will be essential to ensuring the parking program adapts to best fit the needs of the community. Data-driven decisions will enhance the success of parking management strategies, policies, and regulations by allowing the City to remain flexible in their approach. The use of LPR is an efficient and cost-effective way to capture ongoing parking data since this tool is already utilized for parking enforcement purposes. Data would automatically be collected during regular parking enforcement patrols that can be leveraged to produce key parking metrics such as the level of parking congestion, turnover rates, and repeat parking trends, which can be used to inform data-driven parking policies and regulations in the future. It is recommended that parking enforcement staff turn on the mobile LPR units whenever the enforcement vehicle leaves the City building, regardless of whether staff are actively enforcing parking or not, in order to collect as much parking data as possible. The LPR data should be anonymized and analyzed for parking demand trends by time of day, day of week, and month, and the City should produce quarterly reports to summarize the parking utilization metrics and help inform any policy or program changes. DIXON has provided additional recommendations for data collection and analysis in the Parking Rate Study.

Citation and Permit Management System (CPMS)

The City currently contracts with IPS for citation and permit management through a 5-year contract that was executed on June 22, 2022. However, the City has run into several issues with the vendor on both the citation and permit management modules, including vendor's failure to comply with citation processes that are mandated by various California Vehicle Codes (CVC), challenges with the IPS enforcement software on the handheld devices such as delays in citation uploads, difficulties with the customer portal on both the City- and public-facing platforms, delays in customer response times, and inadequate integration mechanisms with other technology providers in the City. Given the number of difficulties the City has faced with the IPS CPMS, the City is reviewing available contractual remedies and the potential for soliciting a new CPMS vendor that is able to provide integrated turnkey services. Specifications for CPMS are detailed in Attachment 4.

Currently, parking citations fall under the Parking Division, Police Department, and Parks and Recreation. Parking enforcement staff in the Parking Division utilize a handheld mobile device with IPS software for citation issuance. The Police Department (PD) does not use handhelds or IPS software, and instead uses paper tickets to issue citations. The Parking Division processes these paper tickets and manually enters the citation into the IPS system on the PD's behalf. In exchange, the PD provides contributions to fund the citation management processes associated with parking through a State and County surcharge of \$13 paid per citation, a handicap linkage fee of 25% of the maximum fine, a parking staff labor fee of \$4.32 per issued

citation, a delinquent notice fee of \$1.25 per letter sent, and a portion of the monthly IPS software license fee. Since the City has a parking enterprise fund, all revenues from parking citations are deposited into the enterprise fund. City staff currently does revenue reconciliation reporting on a quarterly basis to identify the revenue sources for parking citations from the different departments. However, it is recommended that reporting be done on a biannual basis instead, preferably aligned with the beginning of the fiscal year and the fiscal mid-year, as this would be most advantageous to City staff for fiscal year planning and budgeting. The volume of tickets from Parks and Recreation Park Rangers are minimal, and the revenues from those citations are maintained in the Parking Enterprise Fund.

The City has begun digitizing the Downtown parking permits using the IPS Permit Management System starting with garage permits and plans to eventually digitize commercial permits and 10-hour permits in 2025. Currently, the City issues physical hang-tag permits, and these permit buyers are required to visit the City's parking office to pick up their permits. The residential parking permits can still only be purchased by mail or in person at the Mobility Services office in Downtown SLO. Transitioning these residential permits to a digitized (virtual) permit system will allow property owners to purchase and manage permits online and lift any administrative burden from City staff.

The Student Neighborhood Assistant Program (SNAP) is a program that operates within the Police Department. SNAP workers primarily focus on code enforcement but also help the Parking Division with enforcement in the residential permit parking districts after 9 PM. The SNAP team utilizes handhelds with IPS software to issue citations. However, the City is considering eliminating this arrangement with SNAP and instead hiring additional enforcement officers in the Parking Division to cover the residential permit parking districts for nighttime enforcement utilizing LPR. Once the residential parking permits are fully digitized, SNAP workers will not be able to enforce the permits as they do not use mobile LPR for enforcement. Consolidating residential permit enforcement to operate uniquely under the Parking Division can be advantageous as they already have LPR technology, enforcement coverage can be optimized, and it can also help minimize administrative efforts as it relates to parking permits.

Currently, the customer portals for citations and permits are two separate platforms, which prevents the public from being able to apply for permits, manage citations, and pay for tickets on one website. Furthermore, the current system does not allow for compliance checks to be conducted on permit applications, which delays administrative processes for City staff to approve permit applications. It is recommended that the City contracts with a CPMS provider that can provide a unified platform to manage citations and permits in one account, which could help streamline operational processes, cut administrative costs, and improve the end-user experience.

Signage

The multi-vendor approach for mobile payment has resulted in confusing signage, which has overwhelmed community members with too many options for payment as seen in Figure 4. With the adoption of a single-vendor model for the mobile payment application, the City would need to update the existing paid parking signage to reflect the proper payment methods available to the community once the single mobile payment provider has been selected. As part of the RFP process, mobile payment application vendors were asked to propose an extensive signage plan that features clear, concise signage that is easy to read and predictable throughout the Downtown area. The City should work closely with the selected mobile payment application vendor to ensure the signage is compliant with City standards and the Manual on Uniform Traffic Control Devices (MUTCD) design requirements. In addition to the paid parking signage, the City should emphasize any time limits applied to on-street parking spaces onto signage, given that it is currently unclear to the general public when there is a time limit applied to a space. A consistent brand and design for signage can help enhance the City's identity through a cohesive visual aesthetic, as well as increase recognition of parking signs. The City could consider creating a parking logo specific to SLO that can be used on all parking signage. Examples of municipal parking logos can be found in Figure 5. The City should ensure that signage colors, sizes, and symbols are consistent and easy to recognize.

The City is currently working on updating their signage in a phased approach. Phase 1 consists of updating the paid parking signage to reflect the single mobile vendor selected, and the City will be installing sign riders under all paid parking signs rather than having them only at the pay station signs. Phase 2 will begin after the technology implementations are complete and will consist of a comprehensive update of all on-street signage to ensure that signs meet MUTCD design requirements, and all parking regulations are accurately displayed, including time limits, paid parking policies, and residential parking policies. When considering the placement of informational signs, the goal is ensuring a parker can easily identify a sign from their parking stall. With this in mind, signs should be placed along the block face every 2 to 4 parallel parking stalls or 4 to 6 angled/perpendicular parking stalls. Additionally, a sign should accompany a pay station to direct parkers where they can make a payment. Any regulatory

Figure 5. Existing Paid Parking Signage



Figure 4. Examples of Parking Logos



signs, such as no parking or time limits, should follow CVC guidelines. Recommendations for signage are also highlighted in the Parking Rate Study.

While the City works to replace the gateless solution at 842 Palm Street, the City should consider improving the signage and wayfinding at the parking structure to improve the parking experience and eliminate confusion surrounding the gateless solution for drivers in the interim. The City can leverage digital signage on the kiosks themselves or use temporary signs such as A-frames to message parking rules to drivers when they are first initiating their parking session. Considering the gateless solution is not as common and may not be as familiar for drivers, the City should communicate the expectations to drivers as clearly and directly as possible such as through instructional signage at the ingress points to communicate the “park, pay, play” concept to visitors, such as the example in Figure 6.

Figure 6. Example Parking Signage



Electric Vehicle Chargers (EVC)

The City has a contract with ChargePoint for their EVC solution. There are currently 22 EVCs in the 871 Marsh Street garage, and the City plans on installing 41 EVCs at the new CADPS. With the understanding that ChargePoint does not integrate with the selected technology provider for PARCS, the City has decided to continue contracting ChargePoint for their EVC solution. However, the City may choose to re-evaluate their EVC solution in the future to allow for proper integration with the PARCS technology to be installed at the parking garages, which may improve operational processes and improve the user experience.

Technology Vendor Contracting

As the City procures new technology partners, it is recommended to consider the following components to be included in each contract based on industry best practices.

- **Service Level Agreements (SLA)** - The City should include SLA's as part of each agreement, which are used to measure the performance of the vendor during the term. Recommended SLA's are being provided to the City as part of the scope of work for each technology.
- **Data and Security Requirements** - The City should include specifications for data and security requirements in each agreement, which are used to ensure compliance with related laws as well security and proper ownership of the City's data. Recommended requirements have been provided to the City as part of the scope of work for each technology.
- **Data Integration** - The City should introduce and maintain data integration standards for all vendor agreements and contracts in order to establish operational consistency and future-proof the parking technology system. Incorporating these standards into any future contracts with technology vendors can allow the City to maintain authority in the data being collected and used by the vendor, ensure compliance with the City's security and system requirements, streamline integration processes with other technology

systems, and can also enable smoother transitions between vendors if the City chooses to terminate a vendor for any reason.

- **Contract Term** - The City should consider the length of each contract based on the technology provided. A base five (5) year term for most agreements is a generally accepted standard. Optional one (1) year extensions up to ten (10) years total may also be included allowing the City flexibility to maintain a partnership that is advantageous. For technologies that require little capital to implement, such as mobile payments, a shorter base term of three (3) years with optional one (1) year extensions up to ten (10) years total is recommended.

Included in Attachment 5 are requirements related to Data, Security and Integrations that can apply to most parking technology contracts.

QR Code Scams

As the City moves towards implementing new technologies, it is imperative to consider QR code scamming which has become all too common, especially in a payment environment. The scam involves unauthorized individuals affixing QR codes to parking meters, pay stations and signage. Once a customer scans the QR code, they are guided to an app or site instructing them to enter their payment credentials (bank card, banking information, etc.). If the customer continues through the process, their payment credentials are captured and used for fraudulent activity. These scams have become more complex and convincing, sometimes even including city branding.

At this time, it is recommended for the City not to use any physical QR codes for payment. Additionally, advertising that the City does not use QR codes notifies customers not to use any QR codes they might find. Advertising can include postings on signage, stickers, meters, pay stations, and informational materials and websites. As part of ongoing maintenance procedures, the City should include a regular physical check of assets to ensure no QR codes have been affixed or remove any that have been. As this is an evolving trend, City staff should complete continuous research and adjust policies as the scams change.

Garage Security

Creating a secure garage environment is key to ensuring the safety of customers as well as creating a welcoming space. While not included in the scope of this roadmap, the City is encouraged to complete an assessment of each facility and consider the addition of features that enhance safety and security. With the use of both technologies and physical elements, parkers will not only feel more comfortable entering the garage for the first time but will also be confident returning to park upon future visits. In addition, these investments will help protect the City's parking assets for the long term. The City may consider launching a pilot program to test the effectiveness of the various security technologies and enhancements. While conducting an assessment, the City may consider the following enhancements:

- **Security Cameras** - Cameras can be utilized to monitor the ingress and egress points, pedestrian entry and exit points, payment stations, stairwells and each floor. Video footage should be saved for at least three months in order to be reviewed in case of an incident. Additionally, signs should be posted notifying visitors of active recording.

- **Lighting** - The entire facility should be well lit, including each floor, stairwells and entry and exit points.
- **Paint** - Utilizing white or light-colored paint creates a brighter and welcoming atmosphere, and prevents shadows and dark corners.
- **Security Services** - Third party security services can be contracted to add a physical presence in the garage. The security personnel can conduct foot patrols, or vehicle patrols, which would allow them to cover multiple facilities.
- **Call Boxes** - Emergency call boxes may be installed in facilities, so that a customer in distress may easily press a button to reach emergency personnel.
- **Other Security Technology** - Security technology continuously advances with new features such as mobile robots and wall or pole mounted security centers.
- **Netting or Edge Guard** - As planned for the Cultural Arts District Garage, netting can be installed to block off open spaces on higher floors of the garage.

Summary of Recommendations

The following section summarizes the near-term, mid-term, and long-term recommendations for parking technology and operating systems in the City’s parking program that were covered in this Roadmap:

Section	Recommendations
PARCS	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should work with the selected PARCS vendor to prioritize reverting the 842 Palm Street garage from a gateless to a gated solution. <p><i>Long-term:</i></p> <ul style="list-style-type: none"> The City should install the same PARCS technology at the other parking facilities to ensure consistency in the paid parking system.
Pay Stations	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should terminate their pay station contract with IPS and release an RFP for a new pay station vendor. <p><i>Long-term:</i></p> <ul style="list-style-type: none"> The City should consider re-evaluating pay station placements as the City starts to phase out single-space meters and install more pay stations in the Downtown area.
Single-space Meters	<p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should phase out all single-space meters out of the Downtown area once a pay station provider is selected through an RFP process to reach an infrastructure-lite program.
Revenue Collection and Reconciliation	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should establish process, procedure, and performance standards with the vendor and internally between Parking Division and Finance Department staff to ensure City policies are followed accordingly for revenue collection and reconciliation processes. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should conduct a comprehensive assessment to re-evaluate the current operating procedures for revenue collection and reconciliation,
Mobile Payment Applications	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should select the single mobile payment application vendor to be used for the parking program. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should work with the mobile payment vendor to set up integrations with the pay station provider to allow parking session extensions via mobile app.
Validations	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> While the garage is gateless, the City could consider working with the mobile payment vendor to introduce validation codes for use by jurors in the mobile app.

	<ul style="list-style-type: none"> The City may need to continue using physical passes to accommodate jurors that do not have a mobile device. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should work with the selected PARCS and mobile payment application vendor to set up a fully digitized system for managing and issuing parking validations that allows for both City and business-managed permits. The City should work with the PARCS provider to establish a validation system for juror parking.
LPR	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should replace the existing LPR system at 842 Palm Street with the LPR solution provided by the new PARCS provider to allow for a fully integrated off-street parking system. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should install the same LPR solution at the other parking garages to ensure a consistent design throughout the off-street facilities. <p><i>Long-term:</i></p> <ul style="list-style-type: none"> The City should pursue an LPR system that allows for cloud-based storage in order to provide flexibility for data storage, retention, and sharing capabilities.
Digital Parking Occupancy Signs	<p><i>Mid-term:</i></p> <ul style="list-style-type: none"> Upon installation of the new PARCS technology, the City should work with the selected PARCS vendor to set up an integration with the existing digital parking occupancy signs to populate real-time occupancy counts.
Data Collection and Analysis	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should regularly collect LPR data using the mobile LPR during parking enforcement for parking utilization analysis. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> The City should do quarterly reports of the LPR data collected during parking enforcement to help inform data-driven decisions for any parking program adjustments.
Citation Management System	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> The City should terminate their citation management contract with IPS. Release an RFP for a citation and permit management system vendor. <p><i>Long-term:</i></p> <ul style="list-style-type: none"> The City should consider expanding its parking enforcement staffing so that enforcement of the residential parking permit districts can unite under the

	Parking Division instead of under the SNAP program in the Police Department.
Permit Management System	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> • The City should terminate their permit management contract with IPS. • Release an RFP for a citation and permit management system vendor. <p><i>Long-term:</i></p> <ul style="list-style-type: none"> • The City should digitize the residential parking permits to allow for plate-based enforcement utilizing LPR technology and a digitally managed permit program.
Signage	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> • The City should update paid parking signage to reflect the single mobile payment vendor selected from the RFP process. • The City should post additional signage at 842 Palm Street in the interim to help communicate to users on how to properly pay for parking. <p><i>Mid-term:</i></p> <ul style="list-style-type: none"> • The City should update all downtown and residential signage to be compliant with MUTCD standards and to accurately reflect business rules relating to paid parking, time limits, and residential parking restrictions. • The City should establish a list of standards for all signage to create a more cohesive, welcoming, and visually appealing streetscape.
EVCs	<p><i>Long-term:</i></p> <ul style="list-style-type: none"> • The City should consider pursuing a different EVC solution that would allow for integration with the PARCS technology at the off-street parking facilities.
Vendor Contracting	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> • The City should incorporate Data, Security, and Integration standards for parking technology contracts.
QR Code Scams	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> • The City should advertise that no QR codes are in use on signage, stickers, meters, pay stations, informational materials, and on the City's parking website to prevent scams. • The City should conduct a regular physical check of assets to ensure no false QR codes have been posted.
Garage Security	<p><i>Near-term:</i></p> <ul style="list-style-type: none"> • The City should launch a pilot program to test various garage security technologies and enhancements for long-term implementation to improve safety and security for parkers in the off-street facilities.

Appendix A - Community Outreach Summary

The City of San Luis Obispo (City) conducted an online survey and held two community meetings during February and March 2024 to solicit feedback from the public regarding their parking experience in Downtown San Luis Obispo (Downtown SLO). Additionally, DIXON monitored email and social media feedback from the community during the same timeframe. As part of the Technology Roadmap, DIXON conducted Needs Assessment Interviews with City staff who are involved in parking enforcement, citation and permit management, administration, and purchasing were interviewed in order to help identify the current challenges and needs as it relates to parking. The following subsections describe the results and key themes from the various community outreach and internal assessment efforts.

Summary of Key Themes

Below is a summary of key themes from a combination of insights from the survey, social media feedback, community meeting feedback, and email feedback.

- Technology issues and general confusion regarding how to pay for parking (pay stations, multi-vendor mobile payment apps, rate structures, signage)
- Increase safety and user experience in garages, especially in gateless structure
- Lowering rates and retaining free hours/days
- Concerns about transparency (2023 changes happened too quickly)
- Concerns about negative impact to locals, visitors, businesses
- Decrease evening paid parking operating hours

Survey Results

The online survey hosted on Open City Hall was open for 31 days starting on February 6, 2024, and closing on March 8, 2024. A total of 2,784 responses were received from SLO’s residents, visitors, business owners, and employees regarding their parking experience in Downtown SLO. Survey respondents were divided into resident or visitor at the beginning of the survey and were later given the opportunity to identify as a business owner, employee, or N/A to answer additional questions. Due to the survey structure, it appears as if the total number of responses across the four audience groups appears to exceed the total number of survey respondents; however, a respondent can be both a resident and a business owner, for example. The table below shows the breakdown of the number of responses by audience group.

Audience Group	Number of Responses
Residents	1,715
Visitors	1,069
Business Owners	104
Employees	235

Key findings from the survey for each audience group are summarized below.

Residents - 1,715 respondents

Of the 2,784 respondents, 1,715 were residents of SLO who offered input on their parking experience in Downtown:






QUESTION 1

Do you reside in the City of San Luis Obispo?

		%	Count
Yes		61.6%	1715
No, I live outside of SLO		38.4%	1069




QUESTION 2

How often do you use public paid parking facilities in Downtown SLO?

		%	Count
5 or more times a week		7.5%	129
2-3 times a week		17.1%	293
Weekly		32.2%	552
Monthly		20.8%	357
Rarely		22.3%	383

QUESTION 3

How satisfied are you with the current experience of using paid parking technology (parking meters, pay stations, mobile payment apps) in Downtown SLO?

		%	Count
Very Satisfied		3.6%	62
Satisfied		13.1%	225
Neutral		15.2%	260
Dissatisfied		29.4%	504
Very Dissatisfied		38.7%	663

QUESTION 4

**What do you consider to be the most important factors when looking for parking?
Rank the following factors from (1) most important to (4) least important.**

1. Cost: Finding a space that is priced at a low rate
2. Speed: Quickly finding an available parking space
3. Convenience: Finding a space right next to my destination
4. Experience: Finding a space in a clean and well-lit environment

QUESTION 8

Does the current 2-hour time limit for most on-street parking spots typically provide enough time for you when you visit Downtown SLO?

		%	Count
Yes, it is usually enough time for me		44.9%	769
No, it is usually not enough time for me		55.1%	945

QUESTION 9

Typically, when you visit Downtown SLO, how long would you prefer to visit Downtown?

		%	Count
Less than 1 hour		3.4%	59
1 hour		6.1%	104
2 hours		28.6%	491
3 hours		41.5%	711
4 hours		14.5%	249
Over 4 hours		5.8%	100

QUESTION 10

How well-informed do you feel about parking policies and any recent changes in Downtown SLO?

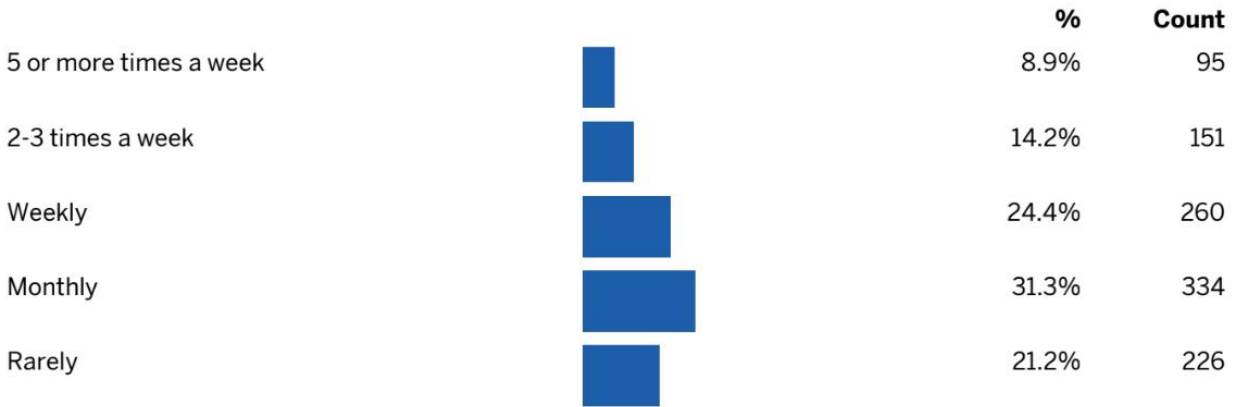
		%	Count
Very well-informed		17.6%	302
Somewhat informed		34.7%	595
Neutral		13.9%	239
Not very well-informed		25.3%	433
Not informed at all		8.5%	145

Visitors - 1,069 respondents

Of the 2,784 respondents, 1,069 offered input on their experiences acting as a visitor or patron in Downtown SLO:

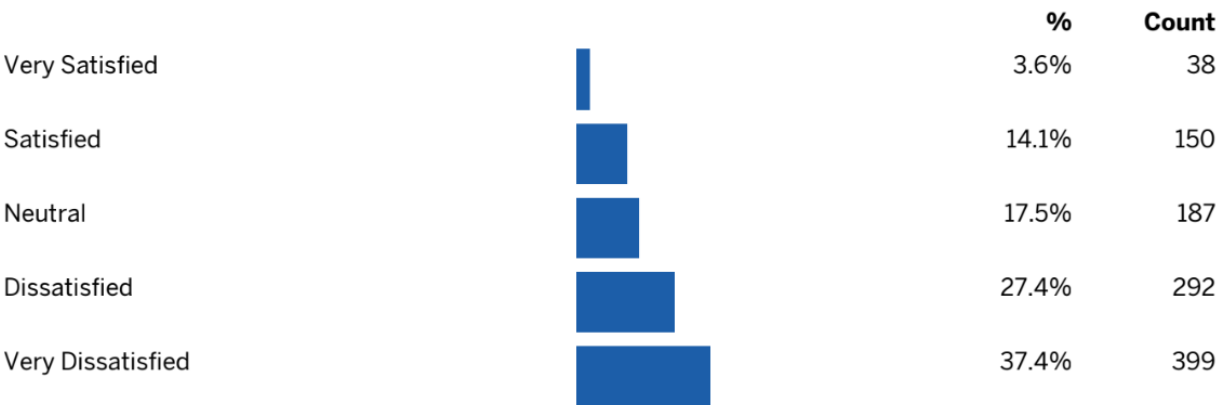
QUESTION 19

How often do you use public parking facilities in Downtown SLO?



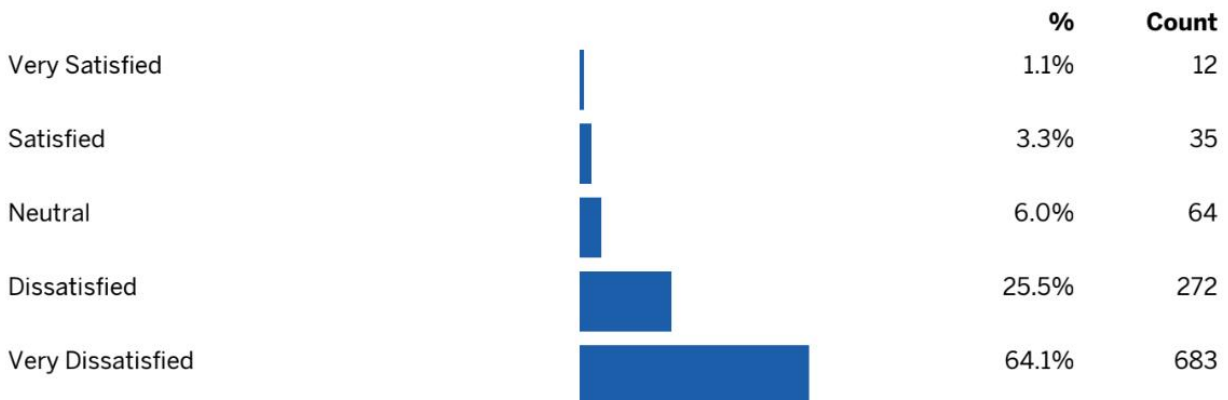
QUESTION 20

How satisfied are you with the current experience of using paid parking technology (parking meters, pay stations, mobile payment apps) in Downtown SLO?



QUESTION 21

How satisfied are you with the current paid parking rates in Downtown SLO?



QUESTION 22

**What do you consider to be the most important factors when looking for parking?
Rank the following factors from (1) most important to (4) least important.**

1. Cost: Finding a space that is priced at a low rate
2. Speed: Quickly finding an available parking space
3. Convenience: Finding a space right next to my destination
4. Experience: Finding a space in a clean and well-lit environment

QUESTION 25

How easy is it to find an available parking space in your most frequently visited areas?



QUESTION 26

Does the current 2-hour time limit for most on-street parking spaces typically provide enough time for you when you visit Downtown SLO?



QUESTION 27

Typically, when you visit Downtown SLO, how long would you prefer to visit Downtown?

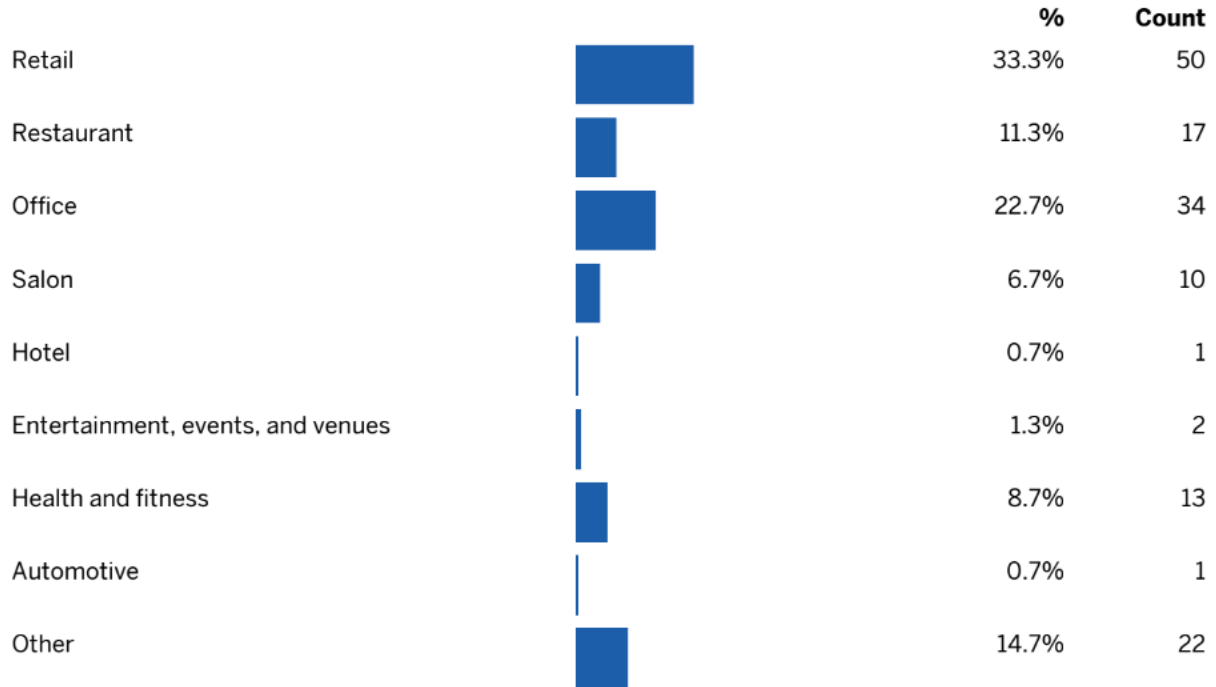


Business Owners - 104 respondents

Of the 2,784 respondents, 104 were business owners in Downtown SLO who offered the following data:

QUESTION 33

Which of the following best describes your business?



QUESTION 35

How many on-site parking spaces does your business provide for employees?



QUESTION 36

What is the maximum number of employees you have at work at any given time?



QUESTION 39

Do you think the current on-street time limit of 2 hours typically provides enough time for your customers to park in and visit Downtown?



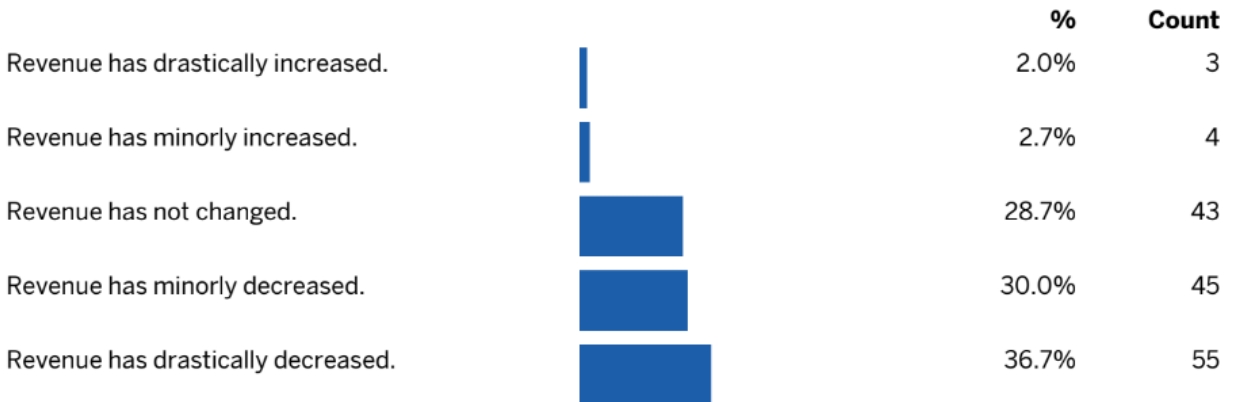
QUESTION 40

On a typical day, do you think there is enough convenient parking available for your customers Downtown?



QUESTION 41

How has the 2023 paid parking rate increases affected your business revenue?



QUESTION 42

Do you believe there are sufficient long-term parking options available for customers in your area?



QUESTION 43

Do you think the current on-street meter permit time limit of 10 hours typically provides enough time for your employees to park in and work Downtown?



QUESTION 44

On a typical day, do you think there is enough convenient parking available for your employees Downtown?



QUESTION 45

Do you purchase either the Quarterly Structure Pass (for parking structures) and the 10-hour meter permit (for street parking) for yourself or your employees?

		%	Count
Yes		32.7%	49
No		67.3%	101

QUESTION 60

If you have employees who cannot park on-site for work, do you provide them with the City parking permits?

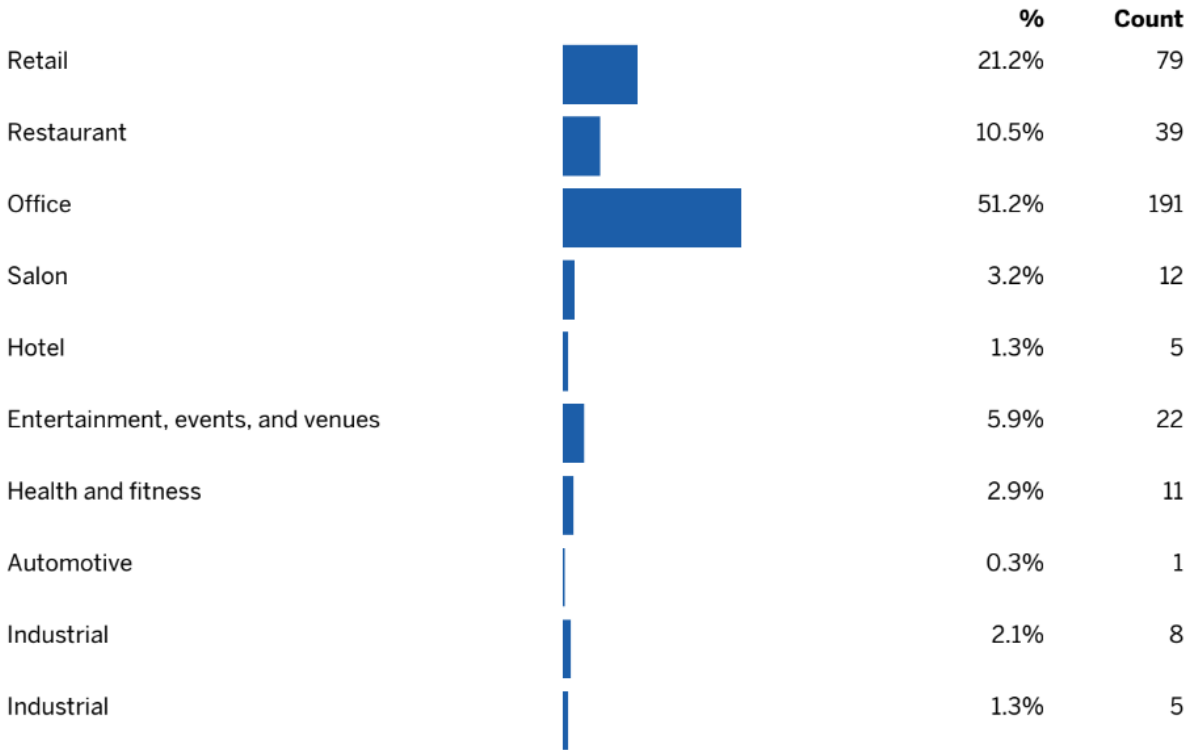
		%	Count
Yes, I obtain parking permits from the City and assign them to my employees.		44.9%	22
Yes, I reimburse my employees for parking permits.		8.2%	4
No		44.9%	22
Not applicable, I have sufficient on-site parking for my employees.		2.0%	1

Employees - 235 respondents

Of the 2,784 respondents, 235 were employees of Downtown SLO who offered the following data:

QUESTION 46

Which of the following best describes where you work?



QUESTION 48

Where do you typically park while you are at work?



QUESTION 49

How far away do you typically park from work?



QUESTION 50

How long does it typically take you to find an available parking space before work?



QUESTION 51

If you are parking in 2-hour on-street spaces, how frequently do you park or re-park while at work?



QUESTION 52

Do you think the current on-street time limit of 2 hours typically provides enough time for your customers to park in and visit Downtown?



Not sure		21.2%	79
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QUESTION 53

On a typical day, do you think there is enough convenient parking available for your customers Downtown?

		%	Count
Yes, my customers can typically find nearby parking.		17.2%	64
No, my customers typically have a challenge finding nearby parking.		62.5%	233
Not sure		20.4%	76

QUESTION 54

Do you believe there are sufficient long-term parking options available for customers in your area?

		%	Count
Yes, there are enough long-term parking options.		16.4%	61
No, there are insufficient long-term parking options.		63.0%	235
Not sure / No opinion		20.6%	77

QUESTION 57

Do you purchase either the Quarterly Structure Pass (for parking structures) and the 10-hour meter permit (for street parking)?

		%	Count
Yes		18.5%	69
No		81.5%	304

Community Meetings

Five community meetings were held, with two being held in-person and three being held virtually via Zoom. The following table summarizes the details of each community meeting:

Name	Date(s)	Setting	Number of Attendees*
Community Meeting Round 1	February 13, 2024	In-Person	35
	February 14, 2024	Virtual	20
Community Meeting Round 2	April 4, 2024	In-Person	22
	April 5, 2024	Virtual	15
Community Meeting Round 3	May 2, 2024	Virtual	12

*Including DIXON and/or City staff.

Overview of Community Meeting Rounds

- The first round (comprised of one in-person and one virtual meeting) focused on identifying and receiving feedback from the community on their parking experiences.
- The second round (comprised of one in-person and one virtual meeting) focused on sharing preliminary findings from community outreach, the parking utilization study, and initial financial modeling.
- The third round (comprised of one virtual meeting) focused on sharing the final parking rate model options for community feedback.

Key Themes

Community Meeting Round 1

- **Paid Parking Rates:** Current rates are too high, were changed too quickly, and are negatively impacting businesses and visitors. Rates should be more affordable, including discounted rates for certain groups, free parking hours/days, and longer time limits. Some community members have recommended dynamic pricing structures.
- **Technology Issues and User Experience:** Confusion and frustration with the current parking system, including difficulties with payment methods, time limits, use of the gateless structure, mobile apps, and signage. It should be simple and consistent in how one pays for parking. Residents are asking for immediate action to improve the gateless structure parking experience.
- **Transparency:** Desire for more transparency and communication from the city regarding parking policies and changes.
- **Prioritizing Locals:** Advocacy for the prioritization of local residents and businesses in parking policies over tourism-related interests, such as through resident benefit programs.

Community Meeting Round 2

- **Financial Modeling:** Emphasis on lowering rates as a top priority for community members. Confusion about the structure of the parking enterprise fund.

- **Technology Issues and User Experience:** Desire for improvements to wayfinding and signage at parking structures, and more clear communication of existing rate structures to eliminate confusion.
- **Welcoming back locals:** Desire for programs and marketing efforts to welcome locals back to Downtown San Luis Obispo and rebuild trust with the community, such as a PR campaign through promotional codes on the mobile payment apps.

Community Meeting Round 3

- **Financial Modeling:** Emphasis on lowering rates as a top priority for community members. Interest in convenient, accessible short-term parking for pick-up/drop-off and running errands. Interest in ensuring that parking program revenue is minimal in order to achieve the lowest rates possible.
- **Parking Fund:** Interest in exploring potential alternative funding sources for the Parking Fund.

Email and Social Media Feedback

DIXON received email commentary and monitored SLO's social media sites (Instagram, Facebook, and Twitter) for feedback from February 5th to March 11th. Approximately 80 emails and 60 social media comments were received. The following key themes and recommendations were identified:

- **Paid Parking Rates and Operations:** Community members recommended changing the paid parking hours to end at 6PM instead of 9PM, keeping the first hour free to encourage business activity, and free parking on Sundays. There was also interest in implementing demand-driven parking rates. General concerns around the inconsistency of pricing structures between on-street and off-street were mentioned, and community members recommended adding more signage to make the pricing structures easier to understand. Some community members recommended a discounted parking rate for residents.
- **Technology Issues and User Experience:** Community members expressed difficulty with using the kiosks and trying to estimate time needed to park prior. Inability to add time to parking session via mobile app was also mentioned.
- **Safety:** Community members expressed that cleanliness and safety should be a priority, and that some parking structures feel unsafe due to poor lighting. Community members also expressed feeling unsafe when walking from a parking space to their destination.
- **Accessibility:** Several community members expressed a desire for more loading/unloading spaces around downtown, as well as more accessible parking spaces. Community members also expressed a desire for better transit options, including more frequent bus routes downtown to encourage less vehicle use.

Internal Needs Assessment Interviews

DIXON conducted four internal Needs Assessment interviews to discuss current parking operations and the City's desired direction for the parking program in the future. City staff from the following departments/divisions were interviewed as part of the process:

- Mobility Services
- Parking Division
- Procurement Division
- City Attorney's Office

The Needs Assessment interviews were organized to cover the following topics. Key takeaways and discussion points for each topic are summarized below:

- **Operations and Maintenance:** Staff highlighted the importance of easy-to-use paid parking technologies, including simple user interfaces on pay stations for a seamless parking experience. Staff expressed their desire to remotely control, and trouble shoot the pay stations in real-time from a computer system in-house instead of necessitating a ticket to be submitted to the technology provider, which can significantly delay maintenance procedures. In general, staff would like to see more efficient customer service response times from the technology providers.
- **Citation Processing and Permits:** Staff expressed their desire to have a unified platform for permit and citation management, both for the City and for the public. The group discussed the need to focus on backend citation processing and administrative tasks, particularly addressing customer complaints about delays in receiving citation notices and appeals. Staff have expressed that the current citation adjudication process is complicated and inefficient, lacking necessary functionalities like customizable notices and the ability to handle partial payments, which leads to customer dissatisfaction and administrative burdens.
- **Enforcement:** Staff expressed challenges with load times for LPR data to be populated to enforcement handhelds, which can delay enforcement patrols. Staff expressed frustrations with the current enforcement software, such as delays in citation processing, difficulty in adding notes after issuing citations, and the inability to easily search for vehicle information. Overall, the current system lacks real-time updates and efficient data management. Staff expressed that they would like real-time location updates, improved search functions for citation data entry such as vehicle make, and improved internal communication regarding device issues and support ticket responses. Staff also highlighted the importance of creating an internal log for documenting issues and holding technology vendors accountable for any delays or technical failures.
- **Purchasing and Contracting:** Staff have recognized the difficulties with the current enforcement module technology provider and have expressed concerns about termination clauses. Staff have expressed the need for a cohesive strategy in contract negotiations and terminations in order to minimize any potential revenue losses and operational disruptions.

Appendix B - PARCS Performance Standards

Following are suggested performance standards and measurements for a PARCS technology contract. These are to be considered in addition to Attachment 5, which includes Data, Security and Integration requirements that may also apply.

- **Management System or Bank Card Processing Failure:** Any failure of the Management System or bank card processing solution provided by the Contractor that prevents the processing of bank cards and the collection of related revenue shall result in damages of \$500 per 24 hour period. City shall provide Contractor with 12-hour notice to respond and repair the failure prior to being entitled to this liquidated damage.
- **Systemic Hardware Issue:** Any hardware failure that affects 25% or more of any one component of the City's equipment fleet at one time which causes in the inability to collect any one type of monies shall result in damages of \$250 per 24-hour period per component. Upon City notice to the Contractor, Contractor will have 10 calendar days to correct the hardware failure, up to and including specific component replacement, prior to the City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in correcting the failure.
- **Systemic Software Issue:** Any software failure that affects 25% or more of any one component of the City's equipment fleet at one time which causes in the inability to collect any one type of monies or charge motorists the correct amount shall result in damages of \$250 per 24-hour period per component. Upon City notice to the Contractor, Contractor will have one business day (24 hours) to correct the failure prior to City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in correcting the failure.
- **PCI Data Security Failure:** Failure of Contractor to maintain Payment Card Industry ("PCI") Data Security Standard Certification, shall result in damages of \$10,000 on the twenty-eight (28th) calendar day following non-compliance ("first assessment"). The twenty-eighth (28th) calendar day following the first assessment and every twenty-eight (28) calendar day thereafter shall constitute a "subsequent assessment". On each additional twenty-eighth (28th) calendar day following the first assessment and any subsequent assessments, the City shall be entitled to liquidated damages of \$25,000 until the failure is cured. Damages during subsequent assessments shall be prorated by day.
- **Cash Reconciliation Accuracy:** Any failure of the Contractor's solution that results in a 3% or greater variation between the actual funds collected versus the Management System reported funds shall result in damages of \$250 per 24-hour period. Upon City notice to the Contractor, Contractor will have seven business days to correct the failure, if determined that Contractor is at fault, prior to City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in identifying and correcting the failure.
- **Customer Support:** Any failure of the system, network, or personnel necessary to provide the required customer support resulting in service not being available to a customer more than two times in a 24-hour period shall result in damages of \$250 per 24-hour period. Upon City notice to the Contractor, Contractor will have one day (24

hours) to correct the failure prior to City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in correcting the failure.

- **City Support:** Any failure of the Contractor to provide the required City Support resulting in support not being available to the City customer within 48 hours of initial email or phone contact shall result in damages of \$250 per 24-hour period. Upon City notice to the Contractor, Contractor will have one day (24 hours) to correct the failure prior to City being entitled to this liquidated damage.
- **RMA Fulfillment:** Any failure to process and ship an RMA or provide notification to the City with reasonable explanation for delay, within 14 days of the receipt of the shipment from the City shall result in damages of \$100 per day until the return RMA shipment is received by the City. The first occurrence of this failure will result in a written warning by the City with no damages applied. Any subsequent failures will incur this liquidated damage without notice being required by the City.

ATTACHMENT 1

Parking Access Revenue Control System (PARCS) Scope of Work

The City is soliciting PARCS vendors ("Vendor") to provide responses on the following services. Responses should not exceed five pages total.

I. Gated Solutions

Vendor shall describe options for gated solutions, including potential frictionless systems, or having gates on either entry or exit only.

II. Pay Stations

Vendor technology must provide Pay by app, QR code, and on foot capabilities. Proposer must describe the options to accept cash and coin.

III. License Plate Recognition (LPR) integration

The City is currently using Genetec FreeFlow at 842 Palm Street. Vendors should advise integration with this solution and/or advise options for plate-based PARCS management to accommodate for permit holders or pre-payment. The City is installing appropriate loop detectors at the CADPS, but may need installation at the other existing garages depending on the solution.

IV. Validations

Vendor must be able to support a validation program, that could include special events and merchant participation throughout the City. Vendor must be able to support business-managed and/or City-managed validations.

V. Reservations

Vendor shall describe reservation capabilities including identifying the operational and enforcement support demands that must be supported by the City.

VI. EV charging integration

Vendor shall describe EVC solutions, and any potential integrations. The City is currently using ChargePoint chargers, however the contract is set to expire on July 22, 2024.

VII. Permits

Vendor must be able to support a monthly e-permit system with LPR and/or Bluetooth access control.

VIII. Pedestrian access control

Vendor shall describe technology options for pedestrian access control at elevators and/or stairwells in the garage structures.

IX. Occupancy counts

Vendor shall describe ability to integrate with existing hardware outside of garage structures for occupancy counts, or provide technology that can yield entry/exit counts such as through AI sensors for sign counters.

ATTACHMENT 1

X. Dashboard (Monitoring / Reporting features)

Vendor shall provide a dashboard that allows City staff to manage and monitor equipment, as well as monitor revenue, occupancy, and validations.

XI. Customer Support

The City is seeking a vendor that will be able to provide 24/7 remote customer support, including assisting customers in-lane and at the pay stations, addressing and correcting errors with customer parking transactions, and transaction or payment disputes. Vendor shall describe the turnkey services offered for customer support.

XII. City Support

The City is seeking a vendor that will maintain consistent responsiveness throughout the entire term length to provide support on any administrative, operational, or technological needs. Vendor shall maintain a single point of contact for the City. Response time has been a challenge within the previous scope, explain your commitment and guarantee that you will contractually commit to regarding response time to the City.

XIII. Additional Features

Vendor shall describe any additional customer service features that are included in the services that will be provided to the City upon implementation. Responses should be specific and describe additional customer service features that are available upon launch of the selected PARCS. Any additional costs associated with these features must be specified.

XIV. Integrations

The PARCS vendor should be able to support any future integrations with the City sub-systems including but not limited to:

- Mobile payment provider (MPP) (TBD)
- License plate recognition technology – Route 1 - Genetec Freeflow (fixed mount) & mobile
 - LPR will be equipped in all garages for entry and exit to offer frictionless PARCS,
- Citation management systems - IPS Group
- Permit management systems – IPS Group
- Intercom customer service vendor (TBD)
- Other vendors (TBD)

XV. Cost Proposal

Vendor shall outline all costs associated with the services provided, including hardware purchase, installation, software, warranty, transaction fees, and any additional costs including integration costs, spare parts and any ongoing fees. See Appendix B for the pricing sheet. Specifications for each garage are detailed in the pricing sheet.

ATTACHMENT 2

Pay by Plate Pay Stations

Scope of Work

Author:

Dixon Resources Unlimited

Updated:

9/5/24

ATTACHMENT 2

1	Project Overview	3
2	Contractor Minimum Requirements	3
3	Pay Station Requirements	3
4	Wireless Two-Way Communications	5
5	Pay Station Display	6
6	Pay Station User Interface	7
7	Payments	8
8	Clock	9
9	Pay Station Power	9
10	Pay Station Security	10
11	Maintenance	10
12	Pay Station Management System	11
13	Warranty & Contract Support	13
14	Project Management	14
15	Training	15
16	Work Order Management (Optional)	16
17	Integrations	16
18	Installation (Option 1 -Contractor)	17
19	Installation (Option 2 - City)	17
20	Other Services (Optional)	18
21	Liquidated Damages	18
22	Submission Requirements	19
23	Technical Compliance Matrix	23
24	Cost Proposal	23

ATTACHMENT 2

1 Project Overview

This Request for Proposals (RFP) is for the procurement of a parking pay station solution to be implemented throughout the City with an emphasis on the customer service experience providing ease of use and convenience to a motorist. The selected Contractor will provide the full range of services including parking pay station equipment, a web-based pay station maintenance system, warranty and customer service support, training, reporting and maintenance tracking, and integrations with existing and future parking technology vendors.

Following are current statics related the to the City’s parking meter program.

City to insert current meter statistics here.

Payment Chanel	Quantity	Approximate Annual Revenue
Pay Station		
Single Spare Meter		
Mobile Payment		

2 Contractor Minimum Requirements

The following is a list of minimum requirements for a Contractor:

- 2.1 Contractor shall have a minimum of three active and currently contracted customers located in the State of California with a minimum of 15 pay station per installation.
- 2.2 Contractor shall have a minimum of ten active clients located in the United States of America with a minimum of 50 pay stations.
- 2.3 Contractor shall have legally operated in the United States of America for a minimum of five years.
- 2.4 Contractor’s proposal and pricing will be valid for at least 180 days from submittal.

3 Pay Station Requirements

ATTACHMENT 2

The following is a list of key requirements for the Pay Station solution:

- 3.1 Pay stations must be able to store at least 10 different rate structures configurable by time of day, length of stay, and day of the week. The technology must allow for simultaneous rate structures to be deployed to different pay stations including static/fixed rates and fixed and escalating hourly rates.
- 3.2 Pay station shall accommodate a pre-payment option (payments made in advance of operating hours).
- 3.3 Pay station technology must be simple to understand and easy to use.
- 3.4 Motorist shall be able to complete a transaction in as few steps/screens as possible.
- 3.5 All technology included in the solution must be reliable, easy to maintain, and secure.
- 3.6 Pay station shall include a large screen to display relevant policy and parking information, rather than using signs or decals posted on the hardware. A touch screen is preferred by the City as the main interface for the motorist. Pay station shall be able to electronically display the following to the motorist with minimal effort:
 - 3.6.1 Rate Options
 - 3.6.2 Days and hours of operation
 - 3.6.3 Motorist instructions
- 3.7 Contractor must offer strong customer support 7 days a week.
- 3.8 All technology, equipment, and systems shall be ADA-compliant to the latest state and federal standards at the time of proposal submission, including all related specifications from Public Right-of-Way Accessibility Guidelines adopted on July 3, 2024.
- 3.9 All materials and components of the pay station shall be new (the most current model or version), unused, and not refurbished. The Contractor may submit the option for use of refurbished (like new) parts, in which case, the Contractor must clearly state which part(s) may optionally be selected by the City and any related cost savings.
- 3.10 Pay station shall have a modular design. Components shall be able to be quickly changed in the field and, to the extent possible, interchangeable between pay stations.
- 3.11 All Pay station electronic components, connections and wiring shall be fully weatherproofed and capable of outdoor use.
- 3.12 Pay station shall be weather, rust, and graffiti resistant and shall be made of stainless

ATTACHMENT 2

steel or an equivalent material.

- 3.13 Pay station shall have additional lighting or illumination for after dark usage and limit the effects of sun glare.
- 3.14 Pay station shall wirelessly communicate usage, payment status, pay station access and maintenance alert data in real-time through a vendor provided cellular plan.
- 3.15 Pay station shall be managed by a web-based parking management system or pay station management system (PSMS).
- 3.16 Pay station and PSMS shall include easy to use with customizable tariff naming and the ability to download rates onto customizable, user-defined groups of pay stations.
- 3.17 Pay station and all components shall be warranted to operate as proposed within a temperature range of negative 15 degrees Fahrenheit to +140 degrees Fahrenheit and under environmental conditions found in the City, including but not limited to sleet, snow, hail, grime, rain, fog, sun (including direct sunlight), and vibrations.

4 Wireless Two-Way Communications

The following is a list of requirements for Wireless Two-Way Communications:

- 4.1 Pay station shall will be equipped with a modem, antenna, and the required software to support wireless communications.
- 4.2 The wireless service will be supplied by the Contractor who shall be responsible for maintaining and updating the service to ensure system uptime in excess of 99% during parking hours of operation.
- 4.3 The wireless communication service and related modem (or other equipment) shall be viable for at least six years from the date of the equipment's delivery.
 - 4.3.1 After six years, if at no fault of the Contractor, the cellular carrier cancels the available service, Contractor will provide written notification to the City at least one year in advance of the cancellation and provide support to the City for upgrading the pay station at the lowest possible cost with a service that will be viable for at least six additional years.
 - 4.3.2 If the communication service is cancelled prior to six years from equipment delivery, Contractor will be responsible for the upgrade of all pay stations including equipment, software, and on-site physical upgrade.
 - 4.3.3 If at any time during the agreement communication service cancellation or degradation is determined to be the fault of the Contractor, Contractor will be responsible for the upgrade of all pay stations including equipment, software, and on-site physical upgrade.

ATTACHMENT 2

- 4.4 Pay station shall have the ability to select from different cellular carriers that may be best for different locations.
- 4.5 Contractor will identify the likely cellular carrier(s) to be used for service and the process of determining reliability of signal coverage.
- 4.6 Contractor will provide options for connectivity besides cellular data; e.g., hardwired, fiber, Wi-Fi, etc.
- 4.7 Pay station transactions shall be communicated to the back-office system in real time to support pay-by-plate pay station enforcement queries.
- 4.8 In the case of communication outages (offline), the pay station shall be capable of storing transactions (as allowed by EMV standards), events and alarms for at least seven days, until communication is restored, at which point the data shall be transmitted to the back-office system.

5 Pay Station Display

The following is a list of requirements for the Pay Station Display

- 5.1 Pay station shall include a touch screen display.
- 5.2 Display shall be easy to read under various daytime and nighttime lighting conditions, including fog, direct sunlight, and at various angles.
- 5.3 Display shall be backlit and will be large enough to legibly display all necessary operating status messages to users and repair personnel. The display must be energy efficient and operate in a solar-charging (or equivalent, as applicable) configuration and not cause excessive battery drain.
- 5.4 Display shall be scratch and impact resistant.
- 5.5 Current rates and hours must be able to be displayed on the graphic display and be remotely programmed.
- 5.6 Display shall allow for the option to inform motorist of expiration of their paid parking session.
- 5.7 Motorists shall be able to select their rate option prior to submitting payment in order for the pay station to translate the amount due and inform the motorist of the payment value.
- 5.8 Display shall support dynamic messaging functionality to reflect changes in pricing, regulations, display messages, format, or configurations made in the PSMS and communicate wirelessly to the pay station at least once per day. The City shall have the ability to change or adjust the graphic display independent of Contractor support

ATTACHMENT 2

and there shall be no additional costs for these types of adjustments.

- 5.9 Display shall have the ability to display special messaging.
- 5.10 Display shall clearly communicate instructions and error messages to the motorist. Where possible, alphanumeric and graphical representation is preferred. At a minimum, the display shall be capable of providing the following information:
 - 5.10.1 Rates
 - 5.10.2 Days and hours of pay station operation
 - 5.10.3 Related parking regulations
 - 5.10.4 Card Read Error – Communicating if a motorist’s card was not appropriately read by the pay station.
 - 5.10.5 Coin Payment Unavailable – Communicating that coin payment is unavailable as a payment method.
 - 5.10.6 Bill Payment Unavailable – If applicable, communicating that bill payment is unavailable as a payment method.
 - 5.10.7 Card Payment Unavailable – Communicating that bank card payment is unavailable as a payment method.
 - 5.10.8 Card Payment Declined – Communicating that the provided bank card was declined and to use another payment method.
 - 5.10.9 Out of Order – Communicating that the pay station is fully out of order.
 - 5.10.10 Receipt Unavailable – If applicable, communicating that a printed receipt is unavailable.
 - 5.10.11 Customizable messages as dictated by the City on one or more screens.
 - 5.10.12 Customizable messages notifying the motorist of other payment options (example – text-to-pay or mobile payment) on one or more screens.

6 Pay Station User Interface

The following is a list of requirements for the Pay Station User Interface

- 6.1 Any pay station buttons, touch screens or physical touch points must be vandal resistant, weatherproof, and corrosion resistant.
- 6.2 Any pay station buttons shall include a lighting feature so that a motorist can easily find the button in low light scenarios.

ATTACHMENT 2

- 6.3 Any pay station buttons, touch screens or physical touch points shall be easily maintained and replaced as needed.

7 Payments

The following is a list of requirements regarding payments at the Pay Station:

- 7.1 Pay station must allow payment through multiple channels, including coin, cash, and bank card. Near Field Communication (NFC) payment (including contactless bank cards, Apple Pay and Google Pay) shall be supported. The City shall have the option to order any number of pay stations in any payment configuration
- 7.2 Pay station shall accept monies through a jam-resistant coin, bill and bank card interface.
- 7.3 Pay station shall accept all \$0.05, \$0.10, \$0.25 and \$1 coins in active circulation.
- 7.4 If applicable, pay station shall accept all \$1, \$5, \$10, and \$20 bills in active circulation.
- 7.5 Monies must be deposited directly into, and stored in, secured containers in the pay station's vault area.
- 7.6 Monies must be easy to collect, being able to be completed in two minutes or less.
- 7.7 All collection activities should include events reported to the PSMS.
- 7.8 Pay station collection receipt printing shall be optional, allowing for removal of specific revenue information from the printed receipt or on-screen details.
- 7.9 Maintenance personnel must be able to easily clear coin or bills jams without special tools and accessing the coin or bill vault.
- 7.10 Pay station must allow the motorist to pay for a parking transaction at any pay station within a City defined zone.
- 7.11 Pay station will have the ability to allow the addition of time to existing transactions, however, the add time feature must disallow the ability to purchase time past the maximum time allowed by license plate for the parking location.
- 7.12 Pay stations shall be programmed to accept extended payment within applicable City policy requirements.
- 7.13 Pay Station shall allow for multiple motorist payment receipt options, including, but not limited to, print options, receipt by text, or no receipt.
- 7.14 Contractor, the pay station, the associated communications system, the backend server and gateway services shall all be compliant with Payment Card Industry Data

ATTACHMENT 2

Security Standard (PCI Level 1 certified by a Qualified Security Assessor (QSA)) as applicable.

- 7.15 Pay station bank acceptance system will allow and compliant with EMV payments.
- 7.16 Contractor will provide a payment gateway for processing of bank cards which is capable of processing Visa, Mastercard, American Express and Discover.
- 7.17 Contractor will integrate the City's current merchant process, XXXX.

8 Clock

The following is a list of requirements for the Pay Station Clock:

- 8.1 Pay station must have a 365-day calendar real-time clock that completes a time-sync with the server at least once every 24 hours.
- 8.2 Pay station will either retain the time settings during battery replacements or servicing or will accurately reset the time settings without losing prior programming within one minute of restart.
- 8.3 Pay station clock shall be programmable at least one year in advance for automatic daylight savings time changes and shall support any State/Federal changes to Daylight Savings Time.
- 8.4 Pay station clock shall be accurate to within plus or minus two seconds per day (where a day is defined as any given 24-hour period).
- 8.5 Time of day and date shall be available to be viewed in the maintenance screens.

9 Pay Station Power

The following is a list of requirements for the powering of the Pay Station:

- 9.1 Pay stations must have the capacity for power by a rechargeable (or equivalent) battery.
- 9.2 Pay station must include solar recharging capability.
- 9.3 Batteries shall be located in an easily accessible storage area inside the unit that can be changed out in less than 2 minutes and without the use of any specialized tools.
- 9.4 Batteries shall be able to be recharged outside of the pay station.
- 9.5 For environmental reasons, Nickel-Cadmium batteries shall not be used to power the pay stations.

ATTACHMENT 2

- 9.6 When battery voltage falls below a minimum threshold, the pay station will generate an alert prior to the pay station going out of service.
- 9.7 Battery connections will be designed to resist corrosion and sustain a minimum of five years of service.
- 9.8 Current battery voltage for both rechargeable (solar or equivalent) and non-rechargeable batteries will be available on the display and through the PSMS.
- 9.9 All locally stored pay station data will be retained during battery replacement and battery failures for at least seven days.
- 9.10 Contractor shall guarantee a life of at least five years for a battery under normal use. Contractor shall provide training on proper battery care and maintenance to maximize the life of a battery.
- 9.11 Upon end of life of a battery, after 5 years, Contractor shall support the City in the replacement of the battery.

10 Pay Station Security

The following is a list of requirements for the Pay Station Security:

- 10.1 Pay stations shall have high security locks for all housing and cabinet doors.
- 10.2 Cash vault areas of the pay station shall not be accessible from the maintenance compartment and access shall require separate keys.
- 10.3 Vault area will be resistant to vandalism, theft, and other attacks to remove or disable the vault.
- 10.4 Exterior locks shall be internally or flush mounted to reduce visibility to the public.
- 10.5 Exterior locks shall be weather resistant to prevent rust and access of liquid inside the pay station.
- 10.6 Exterior locks shall be uniquely keyed for the City, whereas no other client will have the same combination.
- 10.7 Pay stations shall be resistant to vandalism, theft and other attacks.

11 Maintenance

The following is a list of requirements for the Pay Station Maintenance:

- 11.1 Pay station shall be able to be fully maintained by City staff or its designee.

ATTACHMENT 2

11.2 The following major components shall be able to be replaced by a trained technician within 10 minutes of arrival at the pay station:

11.2.1 Coin acceptor

11.2.2 Bill acceptor (if applicable)

11.2.3 Bank card reader

11.2.4 Main board (CPU)

11.2.5 Printer

11.2.6 Battery

11.3 Any other pay station component shall be replaceable by a training technician within a reasonable time period.

11.4 Any special tools required for maintenance that are not easily available at a standard hardware store will be provided by the Contractor.

11.5 Pay station display shall include a maintenance menu, accessible only by credentials available to a maintenance technician.

11.6 Pay station maintenance menu shall include the following capabilities:

11.6.1 View current status of the pay station

11.6.2 View current events, alerts and/or alarm

11.6.3 View current battery voltage

11.6.4 Test all available components

11.6.5 Print test receipt, if applicable

11.6.6 Test communication to the PSMS

12 Pay Station Management System

The following is a list of requirements for the Pay Station Management System

12.1 The Proposer shall provide and maintain a Pay Station Management System (PSMS) for the term of the contract.

12.2 PSMS shall be hosted by the Contractor, or their subcontractor. Contractor shall maintain full responsibility, contractually or otherwise, for any third-party systems or hosting provided as part of this Proposal.

ATTACHMENT 2

- 12.3 PSMS must provide secure, web-based back-office system including modules for the following
 - 12.3.1 Real time status of all pay stations
 - 12.3.2 Real time and historical events, alert, alarm, and outage data
 - 12.3.3 Real time and historical payment transaction data including search and look up capabilities
 - 12.3.4 Pay station management features including rate policies, display updates and more
 - 12.3.5 Detailed collection reporting to allow for accurate reconciliation of collected cash
 - 12.3.6 Detail bank card processing report to allow for accurate reconciliation of bank card transactions
 - 12.3.7 Standard and customized reporting capabilities including the ability to create custom templates for future use.
- 12.4 PSMS shall allow the City to track events, alerts and alerts from initiation at the pay station to the closing of such items once repaired in the field.
- 12.5 PSMS shall provide the ability to identify pay stations by descriptions, address, and zones. Mapping functionality is a desirable feature.
- 12.6 PSMS shall easily indicate pay station status and send configuration events, alerts and alarms to designated personnel via email and text.
- 12.7 PSMS shall provide real-time verification of parking spaces payment status for enforcement purposes.
- 12.8 PSMS shall allow the remote download of all rate changes, display changes, receipt layout changes, other user interface changes and operating system changes and upgrades with no upcharge for wireless data usage.
- 12.9 PSMS and pay station shall include the ability to program and display different rate schedules by time of day, length of stay, and day of the week, including dynamic and progressive rate structures for peak occupancy periods.
- 12.10 Contractor rate schedules shall be integrated or replicated with other City parking payment systems, such as mobile payment, if applicable, to ensure consistent and accurate rate schedules.
- 12.11 City staff shall have the ability to program rates independent of Contractor support with no additional costs associated with these changes.
- 12.12 PSMS shall include a customizable dashboard that allows the City to display

ATTACHMENT 2

relevant analytics associated with the paid parking program including occupancy data, revenue, and equipment performance.

- 12.13 Contract shall offer the ability to integrate data from third-party systems into the PSMS allowing for a centralized reporting system and inclusion of the data in the dashboard display. Integrations will include, at a minimum, other paid parking technologies for both on and off-street operations.
- 12.14 PSMS shall allow for reports to be exported as Excel, CSVs and/or PDF files.
- 12.15 PSMS shall schedule any batch style reporting to occur on demand or by 5am daily, if applicable.

13 Warranty & Contract Support

The following is a list of requirements for the Pay Station Solution Warranty and Support:

- 13.1 Contractor shall include a minimum of a one-year hardware warranty.
- 13.2 Contractor shall provide a warranty on all software and system solutions for the contract term.
- 13.3 Hardware warranty shall be effective on the same day for all pay stations included in the initial order, becoming effective on the last day of installation of the pay station implementation or 90 days from delivery of all pay stations, whichever comes first.
- 13.4 For any subsequent orders, the hardware warranty shall be effective on the date of delivery.
- 13.5 Contractor shall provide ongoing technical support services through the term of the contract for regular operations and maintenance services, including a toll-free phone number and online help (Help Desk). Support services shall be available from 8am to 5pm Pacific Time Zone, seven days per week (excluding holidays).
- 13.6 Contractor's Help Desk and related staff shall be located in the United States of America.
- 13.7 Contractor shall provide 24 hours per day, 7 days per week monitoring and services for outages or issues that impact the entire system.
- 13.8 Any requests for support that cannot be handled immediately by the Help Desk shall be acknowledged by the Contractor within one business day and updated on a regular basis.
- 13.9 Contractor shall utilize a ticket tracking system to open, track and close support requests from the City.
- 13.10 The system must be capable of providing remote off-site diagnosis and support

ATTACHMENT 2

via wireless access. The system must be capable of remote software upgrades via wireless access.

- 13.11 Contractor shall provide regular and ongoing technical bulletins that identify product notifications, technology updates, lessons learned, and/or system performance that details issues, changes, improvements and upgrades.
- 13.12 Requests for Quotations for parts, equipment or service from the City must be fulfilled within three business days.
- 13.13 Return Merchandise Authorization (RMA) requests from the City must be addressed within three calendar days. Upon return of equipment to the Contractor, the RMA must be processed and return equipment shipped within 14 days and/or a status update as to the expected time of arrival (ETA).
- 13.14 Shipment of the RMA to the Contractor will be at the cost of the City. Shipment of the return equipment will be at the cost of the Contractor.
- 13.15 RMA shipments to the City must include advance email delivery notification, delivery date/time and the associated tracking number to the designated City point of contact. Deliveries to the City shall only occur within regular business hours.

14 Project Management

The following is a list of requirements regarding Project Management for solution delivery:

- 14.1 Contractor shall assign a Project Manager for the duration of the planning, implementation, delivery and installation portion of the contract who will be responsible for, including but not limited to:
 - 14.1.1 Project oversight and delivery of the system.
 - 14.1.2 Being a single point of contact for the City and providing for the management, implementation, and on-going trouble shooting of the System during its installation.
 - 14.1.3 Coordinating efforts with the City and any subcontractors.
 - 14.1.4 Being available as required for onsite work and otherwise available to the City during regular business hours via email, phone or video conference to respond to City needs, questions and or issues.
 - 14.1.5 Developing and maintaining, in consultation with the City, a detailed implementation and project plan for the System.
- 14.2 Contractor's Project Manager shall be experienced in the Contractor's products and parking operations, able to provide guidance and suggestions to the City on best practices.

ATTACHMENT 2

- 14.3 Contractor shall provide a design review process for customizable and configurable portions of the solution. The City shall sign off on the design review documentation before production of these items.
- 14.4 Contractor shall test all hardware, software and systems prior to delivery to the City.
- 14.5 Contractor shall develop a training plan for review and approval by the City.

15 Training

The following is a list of requirements for Training:

- 15.1 Contractor shall provide a training plan that includes, but is not limited to, installation, troubleshooting, repairs, preventative maintenance, revenue reconciliation, and reporting. The training plan shall include:
 - 15.1.1 Types of training course with a target audience
 - 15.1.2 Description of course
 - 15.1.3 Length of course
 - 15.1.4 Method of training (video conference, in person, etc)
 - 15.1.5 Prerequisites for the training course
- 15.2 Contractor training must include, at a minimum, the following City personnel: operations, maintenance, customer support, administration, and finance.
- 15.3 Training will occur in person or via video conference as is most appropriate for the topic. At a minimum, Contractor will provide at least two days of onsite/in person training for operations and maintenance.
- 15.4 Training will be provided by qualified experts from the Contractor.
- 15.5 The City may request additional training sessions at reasons intervals and lengths via video conference for no extra cost for the contract term.
- 15.6 The City may request additional training sessions in person. The Contractor will provide a quote for services within one week, and perform that training within four weeks, of the City's request.
- 15.7 Contractor will provide necessary training to the City for any new, upgraded or additional functionality provided during the term of the contract.
- 15.8 Contractor shall supply, and keep current, digital copies of all operating, training, maintenance, repair and user's manuals, which include detailed instructions for pay station and system usage.

16 Work Order Management (Optional)

The following is a list of requirements for the Work Order Manager Solution:

- 16.1 PSMS shall include a work order management system (WOMS).
- 16.2 WOMS shall automatically create maintenance work order tickets generated by pay stations events, alerts or alarms.
- 16.3 WOMS shall route work orders automatically to the City assigned contacts via email and text.
- 16.4 WOMS shall allow for manual ticket creation for any reason and route for use by maintenance, customer service, City management and more.
- 16.5 WOMS shall provide for the entire life cycle of a ticket including creation, routing, addition of comments/notes, and closing.
- 16.6 WOMS shall provide a mobile application or mobile compatible website for in field entry and activity.
- 16.7 WOMS shall include reporting functionality that allows management to review ticket history and statistics.

17 Integrations

The following is a list of requirements for Pay Station Solution Integration:

- 17.1 Contractor shall provide real-time integration with the City's current, new, and future parking technology and data management Contractors, including, but not limited to, citation issuance/enforcement handhelds, LPR, and mobile payment.
- 17.2 The current required integrations include:
 - 17.2.1 Enforcement – IPS Group, Inc
 - 17.2.2 LPR – Genetec (integrator?)
 - 17.2.3 Mobile payment - TBD
- 17.3 Contractor shall be able to work with outside Contractors to perform data migration, if required by the City.
- 17.4 Contractor will review and comply with the additional data, system and security requirement in Section/Attachment X.

ATTACHMENT 2

18 Installation (Option 1 -Contractor)

The following is a list of requirements for installation of the Pay Station:

- 18.1 Contractor will be responsible for pay station installation at specific locations identified by the City. The Contractor's price will include all costs associated with the activity.
- 18.2 The **City or Contractor** will be responsible for a storage location within the City limits for pay station delivery and provide reasonable access to the facility Monday through Friday during business hours.
- 18.3 The **City or Contractor** will be responsible for removing an existing pay station or meter infrastructure prior the installation by the Contractor.
- 18.4 Contractor will provide one in person, onsite walk-through where the Contractor's Project Manager and a City representative will review each installation site. The Contractor will issue a report listing the details (address, GPS coordinates, etc.) and status of each location with two weeks of the site visit for City review and approval.
- 18.5 Contractor will provide all personnel, tools, equipment, unpacking, assembly, programming, or otherwise as required for installation.
- 18.6 Contractor will provide pay station transportation between the storage facility and the installation locations.
- 18.7 The **City or Contractor** will be responsible for preparing each site for installation prior to Contractor kicking off installation, including any concrete remediation.
- 18.8 The Contractor will provide no less than two technicians working together to complete the installations at a rate of no less than 5 to 10 pay stations per day.
- 18.9 Upon completion, Contractor staff will thoroughly test each pay station and provide documentation of the successful installation and confirmation that each pay station is operating to specification. Review and confirmation of each report by the City will result in acceptance of said pay station.

19 Installation (Option 2 - City)

The following is a list of requirements for installation of the Pay Station:

- 19.1 The City will be responsible for pay station installation.
- 19.2 Contractor will provide a one day in person, onsite installation training session for the City or its designee.
- 19.3 Contractor will provide detailed instructions for pay station installation. Instructions

ATTACHMENT 2

will include all necessary steps for installation, assembly, and set up as well as required tools and equipment.

19.4 Contractor will provide remote (phone, video conference) support during installation period.

20 Other Services (Optional)

The Contractors should consider the following requirements and address them in their proposal as desired:

- 20.1 With the implementation of new paid parking technology public awareness and education is important to any successful parking management program. Contractor shall describe any public outreach/education campaign support that will be included with your solution at no additional cost to the City. Contractor shall provide examples of prior successful implementations, including sample images, emphasizing similar installations and education introducing pay by plate pay stations and new paid parking policies.
- 20.2 The City may consider an option for a merchant validation program to enhance the motorist experience. Contractor shall describe how the proposed parking technology solution would support a merchant validation program and identify any equipment required and additional costs or fees.
- 20.3 The City is interested in innovation and value-added services. Contractors should describe any enhanced services and features that are available to the City currently or in the near future and how these services and features would be integrated to ensure motorist convenience. All associated pricing for any proposed or suggested feature must be identified.

21 Liquidated Damages

The following are the proposed liquidated damages that would be incorporated into any final agreement and should be considered in Contractor's proposal. While it is not the intention of the City to seek a punitive relationship, we are seeking an integrated solution that performs to the standards described throughout the Contractor's proposal and in line with the City's requirements.

Both parties will agree that the annual liquidated damages shall be limited to the amount paid or due to Contractor by the City during a one-year period except in the initial 12-month period of this Agreement, where liquidated damages shall be limited to 30% of the amount paid or due to Contractor by the City during the initial 12-month period of this Agreement. The Contractor agrees to pay (or provide invoice credit) these amounts to the City as set forth:

- **PSMS or Bank Card Processing Failure:** Any failure of the PSMS or bank card

ATTACHMENT 2

processing solution provided by the Contractor that prevents the processing of bank cards and the collection of related revenue shall result in damages of \$500 per 24 hour period. City shall provide Contractor with 12-hour notice to respond and repair the failure prior to being entitled to this liquidated damage.

- **Systemic Hardware Issue:** Any hardware failure that affects 25% (or 40% if less than 10 pay station are installed) or more of the City's pay station fleet at one time which causes in the inability to collect any one type of monies shall result in damages of \$25 per 24-hour period per pay station. Upon City notice to the Contractor, Contractor will have 10 calendar days to correct the hardware failure, up to and including specific component replacement, prior to the City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in correcting the failure.
- **Systemic Software Issue:** Any software failure that affects 25% (or 40% if less than 10 pay station are installed) or more of the City's pay station fleet at one time which causes in the inability to collect any one type of monies or charge motorists the correct amount shall result in damages of \$25 per 24-hour period per pay station. Upon City notice to the Contractor, Contractor will have one business day (24 hours) to correct the failure prior to City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in correcting the failure.
- **PCI Data Security Failure:** Failure of Contractor to maintain Payment Card Industry ("PCI") Data Security Standard Certification, shall result in damages of \$10,000 on the twenty-eight (28th) calendar day following non-compliance ("first assessment"). The twenty-eighth (28th) calendar day following the first assessment and every twenty-eight (28) calendar day thereafter shall constitute a "subsequent assessment". On each additional twenty-eighth (28th) calendar day following the first assessment and any subsequent assessments, the City shall be entitled to liquidated damages of \$25,000 until the failure is cured. Damages during subsequent assessments shall be prorated by day.
- **Cash Reconciliation Accuracy:** Any failure of the Contractor's solution that results in a 3% or greater variation between the actual collected funds versus the pay station/PSMS reported funds shall result in damages of \$25 per 24-hour period per pay station. Upon City notice to the Contractor, Contractor will have seven business days to correct the failure, if determined that Contractor is at fault, prior to City being entitled to this liquidated damage. City will provide reasonable access and support to the Contractor in identifying and correcting the failure.
- **RMA Fulfillment:** Any failure to process and ship an RMA or provide notification to the City with reasonable explanation for delay, within 14 days of the receipt of the shipment from the City shall result in damages of \$100 per day until the return RMA shipment is received by the City. The first occurrence of this failure will result in a written warning by the City with no damages applied. Any subsequent failures will incur this liquidated damage without notice being required by the City.

22 Submission Requirements

ATTACHMENT 2

This section may be incorporated into the City's RFP documents or handled separately.

The Submission Requirements outline the guidelines governing the format and content of the proposal as well as the approach to be used in its development and presentation. The intent of the RFP is to encourage responses that clearly communicate the Proposer's understanding of the City's requirements and its approach to successfully provide the products and/or services on time and within budget. Only information which is essential to an understanding and evaluation of the proposal should be submitted. Items not specifically and explicitly related to the RFP and proposal, e.g. brochures, marketing material, etc. will not be considered in the evaluation.

All proposals shall address the following items in the order listed below in a maximum of **thirty** 8.5" x 11" pages. City required forms, pricing forms and the Technical Compliance Matrix will be considered outside this maximum.

22.1 Cover Letter

- 22.1.1 Provide a letter introducing the Contractor and the solution.
- 22.1.2 Include Contractor's designated contact (name, title, phone, email).
- 22.1.3 Include acknowledgement of any addenda to the original RFP submitted by the City.
- 22.1.4 Includes acknowledgement that the Contractor's offer is valid for at least 180 days from submission.
- 22.1.5 Identify the person(s) (name, title, phone, email) authorized to bind Contractor into any awarded contract and the terms of proposal.

22.2 Company Experience and References.

- 22.2.1 Provide an overview of the company including any United State of America and global operations.
- 22.2.2 Provide a list of three active customers located in the State of California listing the client, services provided, and quantity of hardware (minimum 15).
- 22.2.3 Provide a list of three reference located in the United States of America listing the client, contact information (phone/email), services provided and quantity of hardware.
- 22.2.4 If the Proposer has had an Agreement terminated for default during the past three years, this fact should be disclosed along with the Proposer's position on the matter(s). If the Proposer has experienced no such terminations for default in the past, then the Proposer should indicate as such.

ATTACHMENT 2

22.2.5 Describe Contractor's experience and methodology regarding integrations with parking and mobility related third parties.

22.3 Pay Station Solution

22.3.1 Provide an overview of the pay station hardware being offered by Contractor.

22.3.2 Describe the options for use of refurbished (like new) parts. Contractor must clearly state which part(s) may optionally be selected by the City and any related cost savings.

22.4 Wireless Two-Way Communication

22.4.1 Describe the communication infrastructure, security, and capabilities.

22.4.2 Explain options for connectivity besides cellular data in their proposal.

22.4.3 Describe how the solution will handle offline data in their proposal.

22.5 Pay Station Display & User Interface

22.5.1 Describe the graphic and/or touch screen display.

22.5.2 Describe how a motorist will interact with the pay station utilizing buttons and screens, as well as any visual, audible, or tactile indication that a button has been pressed, as feedback to the motorist

22.5.3 Describe how the display and any physical buttons shall be operated after dark and in the event of sun glare.

22.5.4 Describe the process and features that enable special messaging, i.e., holiday, upcoming lot maintenance, and special event messages, which can be downloaded remotely and how messaging will be shared with the MPP.

22.6 Payments

22.6.1 Describe how a pay station will allow the motorist to pay for a parking transaction at any pay station within a City defined zone.

22.6.2 Describe how a pay station shall be programmed to accept extended payment within applicable City policy requirements.

22.6.3 Describe the process and any additional fees associated with motorist payment extensions may be integrated with the City's mobile payment provider or other payment methods, if applicable.

22.6.4 Describe motorist payment receipt options.

22.6.5 Describe in detail the step-by-step process of Contractor's credit card acceptance

ATTACHMENT 2

procedure from the time a motorist inserts his/her card to the time the money is deposited in the City account.

22.6.6 Include the name of Contractors gateway processor (if using a third party) and the name of the gateway software (if applicable).

22.6.7 Describe the Subcontractors' PCI compliance and the process for staying compliant.

22.6.8 List all available merchant processor integrations available to the City.

22.6.9 Describe any alternative or future payment options, the associated costs or any additional fees.

22.7 Pay Station Power

22.7.1 Describe the entire power system of the pay station.

22.7.2 Describe any alternatives power options different from battery and solar power.

22.8 Pay Station Security

22.8.1 Contractors shall describe the locking system and any manual override process in case of power failure or electronic lock malfunction.

22.8.2 Describe any programmable access parameters including restrictions for maintenance and collections.

22.9 Maintenance

22.9.1 Describe the pay station maintenance features and functions, including the list of components that may be replaced within 10 minutes of arrival at the pay station.

22.10 Pay Station Management System

22.10.1 Provide an overview of the PMS solution being offered by the Contractor including a system architecture diagram.

22.10.2 Provide details on the cyber security and data protection policies and practices.

22.10.3 Describe all available rate structures, how rate schedules are built and how the City can self-manage their rates schedules.

22.10.4 Describe the reporting package available to the City.

22.11 Warranty & Contract Support

22.11.1 Describe the hardware and system warranty, as well as any extended warranty options.

ATTACHMENT 2

22.11.2 Describe any exceptions to the Contractor's hardware warranty terms.

22.11.3 Describe Contractor's support services including customer support availability on-line help features, Help Desk, and optional on-site support.

22.12 Project Management

22.12.1 Describe Contractor's project management team and process for implementation of their proposal.

22.12.2 Provide resumes for the team that will be assigned to the City.

22.12.3 Describe the scope of work and contractual relationship with any subcontractors being included as part of the Contractor's proposal.

22.12.4 Describe Contractor's hardware and software testing process, especially in regard to third-party integrations.

22.12.5 Provide a project schedule from contract execution to installation. Include an accurate timeline for pay station delivery.

22.13 Training

22.13.1 Describe training methodology.

22.13.2 Describe how upgrades to the PSMS or other systems will be distributed, communicated, and implemented (e.g., training of appropriate staff) during the term of the contract.

22.14 Other Services (Optional)

22.14.1 Describe how the Contractor will address any of the optional listed services.

23 Technical Compliance Matrix

The Contractor will complete the Technical Compliance Matrix (TCM) and submit along with their proposal.

TBD

24 Cost Proposal

TBD

ATTACHMENT 2

ATTACHMENT 3



Notice Requesting Proposals for Mobile Parking Payment Application

The City of San Luis Obispo is requesting proposals to establish a single, direct vendor agreement for their mobile parking payment (MPP) system.

All firms interested in receiving further correspondence regarding this Request for Proposals (RFP) will be required to complete a free registration using BidSync (<https://www.bidsync.com/bidsync-app-web/vendor/register/Login.xhtml>). All proposals must be received via BidSync by the Department of Finance at or before **August 28, 2024, at 3pm** when they will be opened electronically via BidSync on the proposal end date and time.

The preferred method for bid submission is electronic via BidSync. However, if you wish to submit a paper copy, please submit it in a sealed envelope to the Department of Finance, City of San Luis Obispo, 990 Palm Street, San Luis Obispo, CA, 93401.

Project packages and additional information may be obtained at the City's BidSync website at www.BidSync.com. Please contact **Donna King, Parking Program Manager** at dking@slocity.org or **805-781-7234** with any questions.

For technical help with BidSync please contact BidSync tech support at 800-990-9339.



The City of San Luis Obispo is committed to including disabled persons in all of our services, programs and activities. Telecommunications Device for the Deaf (805) 781-7410.

TABLE OF CONTENTS

A. INTRODUCTION.....	1
B. SCOPE OF WORK.....	1
C. PROJECT SCHEDULE	3
D. GENERAL TERMS AND CONDITIONS.....	3
E. SPECIAL TERMS AND CONDITIONS.....	6
F. PROPOSAL CONTENT.....	8
G. PROPOSAL SUBMITTAL FORM	12
ATTACHMENT A : FORM OF AGREEMENT	16
ATTACHMENT B : PRICING MATRIX	26

A. INTRODUCTION

The City of San Luis Obispo (SLO) (“City”) is intending to establish a single, direct vendor agreement for their mobile parking payment (MPP) system based on direction of the City Council and supported by extensive community feedback indicating that the current multi-vendor solution has created confusion and frustration, as well as technology issues on the City’s administrative side. The City is seeking an MPP system that is simple, convenient, and easy to use that can support the City’s current and future needs. Considering the recent changes to the City’s parking program, an extensive marketing campaign, supported by the selected MPP, will be crucial to ensure that the community is aware of the operational changes being made and to maintain transparency.

B. SCOPE OF WORK

The City is soliciting proposals from MPP application vendors (“Vendor”) to provide proposals for the following services.

I. Marketing:

The City plans on launching an extensive marketing campaign to support a smooth transition to the single-vendor system. Vendor shall be responsible for developing a comprehensive Marketing Plan including advertising, signage, community engagement, and the transition of users of the previous MPP providers. All marketing assets will be subject to City approval and may include coordination with Downtown associations. Vendor shall describe any advantageous marketing features that will be provided to the City. Please describe successful transitions of existing customer information from other MPP vendors. In addition, propose the timeline associated with all proposed deliverables and features.

II. Signage:

Vendor shall propose an extensive signage plan that features clear, concise signage that is easy to read and predictable throughout the Downtown area. Signage should highlight zone #'s, codes, toll free phone number, and all other pertinent information. Signage specifications will be subject to the City’s approval and must conform to appropriate design standards and signage guidelines. The Vendor will be required to provide, at their cost, sufficient new signs and decals as determined by the City. At a minimum, this will include decals for each single/dual space meter and pay station and upright signage by block face.

III. Promotional Opportunities:

The City intends on utilizing one-time use codes to offer free or discounted parking from time to time as part of their promotional campaign to welcome residents and visitors back to Downtown SLO. Vendor shall describe the ability to push and promote one-time use codes to the existing userbase and support the marketing efforts of the City with marketing materials, like flyers and unique promotional opportunities throughout the term of the vendor agreement. Vendor must be able to manage one-time use codes in-app and eliminate the opportunity for repeat use of one-time use codes by individual users.

IV. Dashboard

Vendor shall provide a customizable dashboard that integrates with City paid parking technology providers including IPS Group and any future paid parking technology providers. The City is seeking a ‘one-stop’ reporting location for all data associated with the parking operation including but not

limited to revenues, occupancy, and on and off street performance. Vendor shall also be able to support the potential integration of on-street and off-street parking data into one centralized reporting solution.

V. Validation system:

Vendor must be able to support a validation program, that could include special events and merchant participation throughout the City. Vendor must be able to support business-managed and/or City-managed validations.

VI. Customer Support:

Vendor shall provide comprehensive customer support to assist customers with registration and initial use of the MPP application, addressing and correcting errors with customer parking transactions, and transaction or payment disputes.

VII. City Support:

The City is seeking a vendor that will maintain consistent responsiveness throughout the entire term length to provide support on any administrative, operational, or technological needs. Vendor shall maintain a single point of contact for the City. Response time has been a challenge within the previous scope, explain your commitment and guarantees that you will contractually commit to regarding response time to the City.

VIII. Configuration Capabilities

Vendor shall be able to provide the following centralized configuration capabilities:

- Daily max rates: Vendor must be able to demonstrate that a customer can build time throughout their session, such that they can add time throughout their existing session without exceeding the daily max¹ in the same day period². The MPP must use the vehicle license plate to ensure that customers who park in the structure, leave, and return to park do not exceed the daily max rate even with separate transactions.
- Meter feeding: MPP must be able to prevent meter feeding (resetting a parking session in the same day) in excess of the posted time limit. i.e., a customer cannot re-initiate a new parking session in violation of the business rules within the same operating day.

IX. Additional Features

Vendor shall describe any additional customer service features that are included in the services that will be provided to the City upon implementation, like Pay by Text. Responses should be specific and describe additional customer service features that are available upon launch of the selected MPP. Any additional costs associated with these features must be specified.

X. Permit Management System

Vendor shall describe their permit management system that can support a license-plate based parking permit for employee and/or residential permits.

- Permit management system (PMS) must have the ability for authorized users to establish an account to manage their permit account online.
- PMS must allow business owners to manage multiple parking permits from a single account.

¹ Current daily max rate is \$8.

² The City of San Luis Obispo's operating day is from 3AM to 3AM. The daily rate based on a license plate cannot exceed \$8.

- PMS must be flexible in design and allow an array of payment options including monthly, quarterly and annual permit options.
- Vendor must describe the credentialing process to determine how a user is qualified and confirmed for a specific meter type.

XI. Integrations:

The MPP System should be able to support any future integrations with the City sub-systems including but not limited to:

- On street technology (single space meters/ pay stations) – IPS Group
- PARCS (TBD)
- License plate recognition technology – Route 1 - Genetec Freeflow (fixed mount) & mobile
- Citation management systems - IPS Group
- Permit management systems IPS Group

XII. Cost Proposal:

Vendor shall outline all costs associated with the services provided, including transaction fees, payment processing fees, setup fees, and any additional costs including one-time expenses, fees associated with the transition of other vendor customer details, integration costs, and any ongoing fees. See Attachment B for the pricing sheet.

C. PROJECT SCHEDULE

Preliminary Schedule	Tasks
August 28, 2024	<ul style="list-style-type: none"> • Proposals Due
September 6, 2024	<ul style="list-style-type: none"> • Vendor Selected
October 1, 2024	<ul style="list-style-type: none"> • Contract commences

D. GENERAL TERMS AND CONDITIONS

PROPOSAL REQUIREMENTS

1. **Requirement to Meet All Provisions.** Each individual or firm submitting a proposal (bidder) shall meet all the terms, and conditions of the Request for Proposals (RFP) project package. By virtue of its proposal submittal, the bidder acknowledges agreement with and acceptance of all provisions of the RFP specifications.
2. **Proposal Submittal.** Each proposal must be submitted on the form(s) provided in the specifications and accompanied by any other required submittals or supplemental materials. Proposal documents shall be submitted electronically via BidSync. However, if you can't submit electronically in BidSync., please email a copy to the contacts listed in the RFP package, if you can't email it, please send a copy in a sealed envelope to the Department of Finance, City of San Luis Obispo, 990 Palm Street, San Luis Obispo, CA, 93401. To guard against premature opening, the proposal should be clearly labeled with the proposal title, project number, name of bidder, and date and time of proposal opening. No FAX submittals will be accepted.

3. **Insurance Certificate.** Each proposal must include a certificate of insurance showing:
 - a. The insurance carrier and its A.M. Best rating.
 - b. Scope of coverage and limits.
 - c. Deductibles and self-insured retention.

The purpose of this submittal is to generally assess the adequacy of the bidder's insurance coverage during proposal evaluation; as discussed under paragraph 12 below, endorsements are not required until contract award. The City's insurance requirements are detailed in Section E.

4. **Proposal Quotes and Unit Price Extension.** The extension of unit prices for the quantities indicated and the lump sum prices quoted by the bidder must be entered in figures in the spaces provided on the Proposal Submittal Form(s). Any lump sum bid shall be stated in figures. The Proposal Submittal Form(s) must be totally completed. If the unit price and the total amount stated by any bidder for any item are not in agreement, the unit price alone will be considered as representing the bidder's intention and the proposal total will be corrected to conform to the specified unit price.
5. **Proposal Withdrawal and Opening.** A bidder may withdraw its proposal, without prejudice prior to the time specified for the proposal opening, by submitting a written request to the Director of Finance for its withdrawal, in which event the proposal will be returned to the bidder unopened. No proposal received after the time specified or at any place other than that stated in the "Notice Inviting Bids/Requesting Proposals" will be considered. All proposals will be opened and declared publicly. Bidders or their representatives are invited to be present at the opening of the proposals.
6. **Submittal of One Proposal Only.** No individual or business entity of any kind shall be allowed to make or file, or to be interested as the primary submitter in more than one proposal, except an alternative proposal when specifically requested; however, an individual or business entity that has submitted a sub-proposal to a bidder submitting a proposal, or who has quoted prices on materials to such bidder, is not thereby disqualified from submitting a sub-proposal or from quoting prices to other bidders submitting proposals.
7. **Communications.** All timely requests for information submitted in writing will receive a written response from the City. Telephone communications with City staff are not encouraged but will be permitted. However, any such oral communication shall not be binding on the City.

CONTRACT AWARD AND EXECUTION

8. **Proposal Retention and Award.** The City reserves the right to retain all proposals for a period of 60 days for examination and comparison. The City also reserves the right to waive non-substantial irregularities in any proposal, to reject any or all proposals, to reject or delete one part of a proposal and accept the other, except to the extent that proposals are qualified by specific limitations. See the "special terms and conditions" in Section C of these specifications for proposal evaluation and contract award criteria.

9. **Competency and Responsibility of Bidder.** The City reserves full discretion to determine the competence and responsibility, professionally and/or financially, of bidders. Bidders will provide, in a timely manner, all information that the City deems necessary to make such a decision.
10. **Contract Requirement.** The bidder to whom award is made (Vendor) shall execute a written contract with the City within ten (10) calendar days after notice of the award. The contract shall be made in the form adopted by the City and incorporated in these specifications.

CONTRACT PERFORMANCE

11. The City's contract terms and conditions that Vendor will be expected to execute and be bound by are attached hereto as Attachment A.

E. SPECIAL TERMS AND CONDITIONS

1. **Contract Award.** Subject to the reservations set forth in Paragraph 9 of Section D (General Terms and Conditions) of these specifications, the contract will be awarded to the lowest responsible, responsive proposer.
2. **Sales Tax Reimbursement.**
For sales occurring within the City of San Luis Obispo, the City receives sales tax revenues. Therefore, for bids from retail firms located in the City at the time of proposal closing for which sales tax is allocated to the City, 1% of the taxable amount of the bid will be deducted from the proposal by the City in calculating and determining the lowest responsible, responsive proposer.
3. **Labor Actions.**
In the event that the successful proposer is experiencing a labor action at the time of contract award (or if its suppliers or subcontractors are experiencing such a labor action), the City reserves the right to declare said proposer is no longer the lowest responsible, responsive proposer and to accept the next acceptable low proposal from a proposer that is not experiencing a labor action, and to declare it to be the lowest responsible, responsive proposer.
4. **Failure to Accept Contract.**
The following will occur if the proposer to whom the award is made (Vendor) fails to enter into the contract: the award will be annulled; any bid security will be forfeited in accordance with the special terms and conditions if a proposer's bond or security is required; and an award may be made to the next lowest responsible, responsive proposer who shall fulfill every stipulation as if it were the party to whom the first award was made.
5. **Contract Term.**
The services identified in this specification will be used by the City for 3 years. The prices quoted for these items must be valid for the entire period indicated above unless otherwise conditioned by the proposer in its proposal.
6. **Contract Extension.**
The term of the contract may be extended by mutual consent for an additional one-year, and annually thereafter, for a total of five years.
7. **Supplemental Purchases**
Supplemental purchases may be made from the successful proposer during the contract term in addition to the items listed in the Detail Proposal Submittal Form. For these supplemental purchases, the proposer shall not offer prices to the City in excess of the amounts offered to other similar customers for the same item. If the proposer is willing to offer the City a standard discount on all supplemental purchases from its generally prevailing or published price structure during the contract term, this offer and the amount of discount on a percentage basis should be provided with the proposal submittal.

8. **Contractor Invoices.**
The Contractor may deliver either a monthly invoice to the City with attached copies of detail invoices as supporting detail, or in one lump-sum upon completion.
- 9 **Non-Exclusive Contract.** The City reserves the right to purchase the items listed in the Detail Proposal Submittal Form, as well as any supplemental items, from other vendors during the contract term.
10. **Unrestrictive Brand Names.** Any manufacturer's names, trade names, brand names or catalog numbers used in the specifications are for the purpose of describing and establishing general quality levels. Such references are not intended to be restrictive. Proposals will be considered for any brand that meets or exceeds the quality of the specifications given for any item. In the event an alternate brand name is proposed, supplemental documentation shall be provided demonstrating that the alternate brand name meets or exceeds the requirements specified herein. The burden of proof as to the suitability of any proposed alternatives is upon the proposer, and the City shall be the sole judge in making this determination.
11. **Delivery.** Prices quoted for all supplies or equipment to be provided under the terms and conditions of this RFP package shall include delivery charges, to be delivered F.O.B. San Luis Obispo by the successful proposer and received by the City within 90 days after authorization to proceed by the City.
12. **Start and Completion of Work.** Work on this project shall begin immediately after contract execution and shall be completed within 90 calendar days thereafter, unless otherwise negotiated with City by mutual agreement.
13. **Submittal of References.** Each proposer shall submit a statement of qualifications and references on the form provided in the RFP package.
14. **Statement of Contract Disqualifications.** Each proposer shall submit a statement regarding any past governmental agency bidding or contract disqualifications on the form provided in the RFP package.

F. PROPOSAL CONTENT

PROPOSAL CONTENT

1. **Proposal Content.** Your proposal must include the following information:

Submittal Forms

- a. Proposal submittal summary.
- b. Certificate of insurance.
- c. References from at least three firms for whom you have provided similar services.
- d. Pricing Sheet per Attachment B.

Qualifications

- e. Experience of your firm and those of sub-consultants in performing work and projects relevant to the Scope of Services outlined and described in the request.
- f. Experience must include work performed in the county of San Luis Obispo or northern Santa Barbara County. This demonstrates the vendors existing familiarity by the community.
- g. Resumes of the individuals who would be assigned to this project, including any sub-consultants, with their corollary experience highlighted and specific roles in this project clearly described.
- h. Standard hourly billing rates for the assigned staff, including any sub-consultants.
- i. Statement and explanation of any instances where your firm or sub-consultant has been removed from a project or disqualified from proposing on a project.

Work Program

- j. Detailed description of your approach to completing the work.
- k. Detailed schedule by task and sub-task for completing the work.
- l. Estimated hours for your staff in performing each phase and task of the work, including sub-consultants, so we can clearly see who will be doing what work, and how much time it will take.
- m. Detailed budget by task and sub-task for completing the work.
- n. Services or data to be provided by the City.
- o. Services and deliverables provided by the Consultant(s).
- p. Any other information that would assist us in making this contract award decision.
- q. Description of assumptions critical to development of the response which may impact cost or scope.

Requested Changes to Terms and Conditions

- r. ***The City desires to begin work soon after selecting the preferred Vendor and expects the Vendor to execute the City's contract and all of the terms therein, as set forth in Attachment A.*** To expedite the contracting process, each submittal shall include requested redlined changes to terms and conditions, if necessary. Please be advised that Vendor requested changes to the City's terms and conditions will be considered by City staff when scoring and determining the competency and responsibility of the proposer.

Proposal Length

- s. Proposal length should only be as long as required to be responsive to the RFP, including attachments and supplemental materials.
2. **Proposal Evaluation and Selection.** Proposals will be evaluated by a review committee and evaluated on the following criteria:
- a. Understanding of the work required by the City.
 - b. Quality, clarity, and responsiveness of the proposal.
 - c. Demonstrated competence and professional qualifications necessary for successfully performing the work required by the City.
 - d. Recent team experience in successfully performing similar services.
 - e. Recent vendor experience performing similar services in the county of San Luis Obispo or north Santa Barbara county.
 - f. Creativity of the proposed approach in completing the work.
 - g. Value
 - h. Writing skills.
 - i. References.
 - j. Background and experience of the specific individuals managing and assigned to this project.
 - k. Information about how your company mitigates the environmental impact of its services, such as greenhouse gas emissions, amount of waste generated, water and energy use, or other areas related to your products and services.

As reflected above, contract award will not be based solely on price, but on a combination of factors as determined to be in the best interest of the City. After evaluating the proposals and discussing them further with the finalists or the tentatively selected Vendor, the City reserves the right to further negotiate the proposed work and/or method and amount of compensation.

3. **Proposal Review and Award Schedule.** The following is an outline of the anticipated schedule for proposal review and contract award:

a.	Issue RFP	August 9, 2024
b.	Receive proposals	August 28, 2024
c.	Complete proposal evaluations	September 6, 2024
d.	Execute contract	September 20, 2024
e.	Start work	October 1, 2024

4. **Ownership of Materials.** All original drawings, plan documents and other materials prepared by or in possession of the Vendor as part of the work or services under these specifications shall become the permanent property of the City and shall be delivered to the City upon demand.
5. **Release of Reports and Information.** Any reports, information, data, or other material given to, prepared by or assembled by the Vendor as part of the work or services under these specifications shall be the property of the City and shall not be made available to any individual or organization by the Vendor without the prior written approval of the City.

6. **Copies of Reports and Information.** If the City requests additional copies of reports, drawings, specifications, or any other material in addition to what the Vendor is required to furnish in limited quantities as part of the work or services under these specifications, the Vendor shall provide such additional copies as are requested, and City shall compensate the Vendor for the costs of duplicating of such copies at the Vendor's direct expense.
7. **Required Deliverable Products.** The Vendor will be required to provide:
- a. One electronic submission - digital-ready original .pdf of all final documents. If you wish to file a paper copy, please submit in sealed envelope to the address provided in the RFP.
 - b. Corresponding computer files compatible with the following programs whenever possible unless otherwise directed by the project manager:

Word Processing:	MS Word
Spreadsheets:	MS Excel
Desktop Publishing:	InDesign
Virtual Models:	Sketch Up
Digital Maps:	Geodatabase shape files in State Plan Coordinate System as specified by City GIS staff
 - c. City staff will review any documents or materials provided by the Vendor and, where necessary, the Vendor will be required to respond to staff comments and make such changes as deemed appropriate.
8. **Attendance at Meetings and Hearings.** As part of the work scope and included in the contract price is attendance by the Vendor at public meetings to present and discuss its findings and recommendations. Vendor shall attend as many "working" meetings with staff as necessary in performing work-scope tasks.
9. **Accuracy of Specifications.** The specifications for this project are believed by the City to be accurate and to contain no affirmative misrepresentation or any concealment of fact. Bidders are cautioned to undertake an independent analysis of any test results in the specifications, as City does not guaranty the accuracy of its interpretation of test results contained in the specifications package. In preparing its proposal, the bidder and all subcontractors named in its proposal shall bear sole responsibility for proposal preparation errors resulting from any misstatements or omissions in the plans and specifications that could easily have been ascertained by examining either the project site or accurate test data in the City's possession. Although the effect of ambiguities or defects in the plans and specifications will be as determined by law, any patent ambiguity or defect shall give rise to a duty of bidder to inquire prior to proposal submittal. Failure to so inquire shall cause any such ambiguity or defect to be construed against the bidder. An ambiguity or defect shall be considered patent if it is of such a nature that the bidder, assuming reasonable skill, ability and diligence on its part, knew or should have known of the existence of the ambiguity or defect. Furthermore, failure of the bidder or subcontractors to notify City in writing of specification or plan defects or ambiguities prior to proposal submittal shall waive any right to assert said defects or ambiguities subsequent to submittal of the proposal.

To the extent that these specifications constitute performance specifications, the City shall not be liable for costs incurred by the successful bidder to achieve the project's objective or standard beyond the amounts provided there for in the proposal.

In the event that, after awarding the contract, any dispute arises as a result of any actual or alleged ambiguity or defect in the plans and/or specifications, or any other matter whatsoever, Vendor shall immediately notify the City in writing, and the Vendor and all subcontractors shall continue to perform, irrespective of whether or not the ambiguity or defect is major, material, minor or trivial, and irrespective of whether or not a change order, time extension, or additional compensation has been granted by City. Failure to provide the hereinbefore described written notice within one (1) working day of Vendor's becoming aware of the facts giving rise to the dispute shall constitute a waiver of the right to assert the causative role of the defect or ambiguity in the plans or specifications concerning the dispute.

G. PROPOSAL SUBMITTAL FORM

The undersigned declares that she or he:

- Has carefully examined this RFP, which is hereby made a part of this proposal.
 - Is thoroughly familiar with its contents.
 - Is authorized to represent the proposing firm.
 - Agrees to perform the work as set forth in this proposal.
- Certificate of insurance attached; insurance company's A.M. Best rating: _____.

Firm Name and Address

<i>Contact</i>	<i>Phone</i>

Signature of Authorized Representative

	<i>Date</i>
--	-------------

REFERENCES

Number of years engaged in providing the services included within the scope of the specifications under the present business name:_____.

Describe fully the last three contracts performed by your firm that demonstrate your ability to provide the services included with the scope of the specifications. Attach additional pages if required. The City reserves the right to contact each of the references listed for additional information regarding your firm's qualifications.

Reference No. 1:

Agency Name	
Contact Name	
Telephone & Email	
Street Address	
City, State, Zip Code	
Description of services provided including contract amount, when provided and project outcome	

Reference No. 2:

Agency Name	
Contact Name	
Telephone & Email	
Street Address	
City, State, Zip Code	
Description of services provided including contract amount, when provided and project outcome	

Reference No. 3

Agency Name	
Contact Name	
Telephone & Email	
Street Address	
City, State, Zip Code	
Description of services provided including contract amount, when provided and project outcome	

**CITY OF SAN LUIS OBISPO
AGREEMENT FOR PURCHASES OF SERVICES**

This Agreement is made and entered into in the City of San Luis Obispo on _____, by and between the City of San Luis Obispo, a municipal corporation, hereinafter referred to as City, and _____, hereinafter referred to as Contractor.

WITNESSETH:

WHEREAS, on [date], City requested proposals for Mobile Parking Payment Application Vendors,

WHEREAS, [_____] is qualified to perform this type of service and has submitted a proposal to do so which has been accepted by City.

NOW THEREFORE, in consideration of their mutual promises, obligations and covenants hereinafter contained, the parties hereto agree as follows:

NOW THEREFORE, in consideration of their mutual promises, obligations and covenants hereinafter contained, the parties hereto agree as follows:

1. **TERM.** The term of this Agreement shall be from the date this Agreement is made and entered, as first written above, for three (3) years, or upon acceptance and completion of said Services, whichever occurs sooner. The term of the contract may be extended by mutual consent for an additional one-year, and annually thereafter, for a total of five (5) years.
2. **INCORPORATION BY REFERENCE.** The "Notice Requesting Proposals for Mobile Parking Payment Application" and Consultant's proposal dated [date] are hereby incorporated in and made a part of this Agreement, attached as Exhibit A. The City's standard terms and conditions are attached as Exhibit B. The City's insurance requirements are hereby incorporated in and made part of this Agreement, attached as Exhibit C. To the extent that there are any conflicts between the Consultant's fees and scope of work and the City's terms and conditions as stated herein, the City's terms and conditions shall prevail unless specifically agreed otherwise in writing signed by both Parties.
3. **CITY'S OBLIGATIONS.** For providing services as specified in this Agreement, and upon receipt of an invoice, City will pay and Contractor shall receive therefor compensation of [_____].
4. **CONSULTANT'S/CONTRACTOR'S OBLIGATIONS.** For and in consideration of the payments and agreements hereinbefore mentioned to be made and performed by City, Contractor agrees with City to do everything required by this Agreement and the said specifications set forth in Exhibit A.
5. **AMENDMENTS.** Any amendment, modification or variation from the terms of this Agreement shall be in writing and shall be effective only upon approval by the City Manager.

EXHIBIT A

CONTRACTOR'S PROPOSAL & CITY RFP

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of RFP and contractor's proposal*

EXHIBIT B

GENERAL TERMS AND CONDITIONS

1. **Business License & Tax.** The Contractor must have a valid City of San Luis Obispo business license & tax certificate before execution of the contract. Additional information regarding the City's business tax program may be obtained by calling (805) 781-7134.
2. **Ability to Perform.** The Contractor warrants that it possesses, or has arranged through subcontracts, all capital and other equipment, labor, materials, and licenses necessary to carry out and complete the work hereunder in compliance with all federal, state, county, city, and special district laws, ordinances, and regulations.
3. **Laws to be Observed.** The Contractor shall keep itself fully informed of and shall observe and comply with all applicable state and federal laws and county and City of San Luis Obispo ordinances, regulations and adopted codes during its performance of the work.
4. **Payment of Taxes.** The contract prices shall include full compensation for all taxes that the Contractor is required to pay.
5. **Permits and Licenses.** The Contractor shall procure all permits and licenses, pay all charges and fees, and give all notices necessary.
6. **Safety Provisions.** The Contractor shall conform to the rules and regulations pertaining to safety established by OSHA and the California Division of Industrial Safety.
7. **Public and Employee Safety.** Whenever the Contractor's operations create a condition hazardous to the public or City employees, it shall, at its expense and without cost to the City, furnish, erect and maintain such fences, temporary railings, barricades, lights, signs and other devices and take such other protective measures as are necessary to prevent accidents or damage or injury to the public and employees.
8. **Preservation of City Property.** The Contractor shall provide and install suitable safeguards, approved by the City, to protect City property from injury or damage. If City property is injured or damaged resulting from the Contractor's operations, it shall be replaced or restored at the Contractor's expense. The facilities shall be replaced or restored to a condition as good as when the Contractor began work.
9. **Immigration Act of 1986.** The Contractor warrants on behalf of itself and all

subcontractors engaged for the performance of this work that only persons authorized to work in the United State pursuant to the Immigration Reform and Control Act of 1986 and other applicable laws shall be employed in the performance of the work hereunder.

10. **Non-Discrimination.** In the performance of this work, the Contractor agrees that it will not engage in, nor permit such subcontractors as it may employ, to engage in discrimination in employment of persons because of age, race, color, sex, national origin or ancestry, sexual orientation, or religion of such persons.

11. **Work Delays.** Should the Contractor be obstructed or delayed in the work required to be done hereunder by changes in the work or by any default, act, or omission of the City, or by strikes, fire, earthquake, or any other Act of God, or by the inability to obtain materials, equipment, or labor due to federal government restrictions arising out of defense or war programs, then the time of completion may, at the City's sole option, be extended for such periods as may be agreed upon by the City and the Contractor. In the event that there is insufficient time to grant such extensions prior to the completion date of the contract, the City may, at the time of acceptance of the work, waive liquidated damages that may have accrued for failure to complete on time, due to any of the above, after hearing evidence as to the reasons for such delay, and making a finding as to the causes of same.

12. **Payment Terms.** The City's payment terms are 30 days from the receipt of an original invoice and acceptance by the City of the materials, supplies, equipment, or services provided by the Contractor (Net 30).

13. **Inspection.** The Contractor shall furnish City with every reasonable opportunity for City to ascertain that the services of the Contractor are being performed in accordance with the requirements and intentions of this contract. All work done, and all materials furnished, if any, shall be subject to the City's inspection and approval. The inspection of such work shall not relieve Contractor of any of its obligations to fulfill its contract requirements.

14. **Audit.** The City shall have the option of inspecting and/or auditing all records and other written materials used by Contractor in preparing its invoices to City as a condition precedent to any payment to Contractor.

15. **Interests of Contractor.** The Contractor covenants that it presently has no interest, and shall not acquire any interest—direct, indirect or otherwise—that would conflict in any manner or degree with the performance of the work hereunder. The Contractor further covenants that, in the performance of this work, no subcontractor or person having such an interest shall be employed. The Contractor certifies that no one who has or will have any financial interest in performing this work is an officer or employee of the City. It is hereby expressly agreed that, in the performance of the work hereunder, the Contractor shall at all times be deemed an independent contractor and not an agent or employee of the City.

16. **Hold Harmless and Indemnification.**

(a) **Non-design, non-construction Professional Services:** To the fullest extent permitted by

law (including, but not limited to California Civil Code Sections 2782 and 2782.8), Consultant shall indemnify, defend, and hold harmless the City, and its elected officials, officers, employees, volunteers, and agents ("City Indemnitees"), from and against any and all causes of action, claims, liabilities, obligations, judgments, or damages, including reasonable legal counsels' fees and costs of litigation ("claims"), arising out of the Consultant's performance or Consultant's failure to perform its obligations under this Agreement or out of the operations conducted by Consultant, including the City's active or passive negligence, except for such loss or damage arising from the sole negligence or willful misconduct of the City. In the event the City Indemnitees are made a party to any action, lawsuit, or other adversarial proceeding arising from Consultant's performance of this Agreement, the Consultant shall provide a defense to the City Indemnitees or at the City's option, reimburse the City Indemnitees their costs of defense, including reasonable legal fees, incurred in defense of such claims.

(b) Non-design, construction Professional Services: To the extent the Scope of Services involve a "construction contract" as that phrase is used in Civil Code Section 2783, this paragraph shall apply in place of paragraph A. To the fullest extent permitted by law (including, but not limited to California Civil Code Sections 2782 and 2782.8), Consultant shall indemnify, defend, and hold harmless the City, and its elected officials, officers, employees, volunteers, and agents ("City Indemnitees"), from and against any and all causes of action, claims, liabilities, obligations, judgments, or damages, including reasonable legal counsels' fees and costs of litigation ("claims"), arising out of the Consultant's performance or Consultant's failure to perform its obligations under this Agreement or out of the operations conducted by Consultant, except for such loss or damage arising from the active negligence, sole negligence or willful misconduct of the City. In the event the City Indemnitees are made a party to any action, lawsuit, or other adversarial proceeding arising from Consultant's performance of this Agreement, the Consultant shall provide a defense to the City Indemnitees or at the City's option, reimburse the City Indemnitees their costs of defense, including reasonable legal fees, incurred in defense of such claims.

(c) Design Professional Services: In the event Consultant is a "design professional", and the Scope of Services require Consultant to provide "design professional services" as those phrases are used in Civil Code Section 2782.8, this paragraph shall apply in place of paragraphs A or B. To the fullest extent permitted by law (including, but not limited to California Civil Code Sections 2782 and 2782.8) Consultant shall indemnify, defend and hold harmless the City and its elected officials, officers, employees, volunteers and agents ("City Indemnitees"), from and against all claims, damages, injuries, losses, and expenses including costs, attorney fees, expert consultant and expert witness fees arising out of, pertaining to or relating to, the negligence, recklessness or willful misconduct of Consultant, except to the extent caused by the sole negligence, active negligence or willful misconduct of the City. Negligence, recklessness or willful misconduct of any subcontractor employed by Consultant shall be conclusively deemed to be the negligence, recklessness or willful misconduct of Consultant unless adequately corrected by Consultant. In the event the City Indemnitees are made a party to any action, lawsuit, or other adversarial proceeding arising from Consultant's performance of this Agreement, the Consultant shall provide a defense to the City Indemnitees or at the City's option, reimburse the City Indemnitees their costs of defense, including reasonable legal fees, incurred in defense of such claims. In no event shall the cost to defend charged to Consultant

under this paragraph exceed Consultant's proportionate percentage of fault. However, notwithstanding the previous sentence, in the event one or more defendants is unable to pay its share of defense costs due to bankruptcy or dissolution of the business, Consultant shall meet and confer with other parties regarding unpaid defense costs.

(d) The review, acceptance or approval of the Consultant's work or work product by any indemnified party shall not affect, relieve or reduce the Consultant's indemnification or defense obligations. This Section survives completion of the services or the termination of this contract. The provisions of this Section are not limited by and do not affect the provisions of this contract relating to insurance.

17. **Contract Assignment.** The Contractor shall not assign, transfer, convey or otherwise dispose of the contract, or its right, title or interest, or its power to execute such a contract to any individual or business entity of any kind without the previous written consent of the City.

18. **Safe Harbor.** Contractor/Consultant's duties and services under this agreement shall not include preparing or assisting the public entity with any portion of the public entity's preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the public entity. The public entity entering this agreement shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of this project. Contractor/consultant's participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications. Contractor/consultant shall cooperate with the public entity to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by contractor pursuant to this agreement."

19. **Termination for Convenience.** The City may terminate all or part of this Agreement for any or no reason at any time by giving 30 days written notice to Contractor. Should the City terminate this Agreement for convenience, the City shall be liable as follows: (a) for standard or off-the-shelf products, a reasonable restocking charge not to exceed ten (10) percent of the total purchase price; (b) for custom products, the less of a reasonable price for the raw materials, components work in progress and any finished units on hand or the price per unit reflected on this Agreement. For termination of any services pursuant to this Agreement, the City's liability will be the lesser of a reasonable price for the services rendered prior to termination, or the price for the services reflected on this Agreement. Upon termination notice from the City, Contractor must, unless otherwise directed, cease work and follow the City's directions as to work in progress and finished goods.

20. **Termination.** If, during the term of the contract, the City determines that the Contractor is not faithfully abiding by any term or condition contained herein, the City may notify the Contractor in writing of such defect or failure to perform. This notice must give the Contractor a 10 (ten) calendar day notice of time thereafter in which to perform said work or cure the deficiency.

If the Contractor has not performed the work or cured the deficiency within the ten days specified in the notice, such shall constitute a breach of the contract and the City may terminate the contract immediately by written notice to the Contractor to said effect. Thereafter, neither party shall have any further duties, obligations, responsibilities, or rights under the contract except, however, any and all obligations of the Contractor's surety shall remain in full force and effect, and shall not be extinguished, reduced, or in any manner waived by the terminations thereof.

In said event, the Contractor shall be entitled to the reasonable value of its services performed from the beginning date in which the breach occurs up to the day it received the City's Notice of Termination, minus any offset from such payment representing the City's damages from such breach. "Reasonable value" includes fees or charges for goods or services as of the last milestone or task satisfactorily delivered or completed by the Contractor as may be set forth in the Agreement payment schedule; compensation for any other work, services or goods performed or provided by the Contractor shall be based solely on the City's assessment of the value of the work-in-progress in completing the overall work scope.

The City reserves the right to delay any such payment until completion or confirmed abandonment of the project, as may be determined in the City's sole discretion, so as to permit a full and complete accounting of costs. In no event, however, shall the Contractor be entitled to receive in excess of the compensation quoted in its proposal.

EXHIBIT B – INSURANCE

Contractors

Without limiting Contractor's indemnification of City, and prior to commencement of work, Contractor shall obtain, provide, and maintain at its own expense during the term of this Agreement, policies of insurance of the types and amounts described below and in a form that is satisfactory to City.

General liability insurance. Contractor shall maintain commercial general liability insurance with coverage at least as broad as Insurance Services Office form CG 00 01, in an amount not less than \$1,000,000 per occurrence, \$2,000,000 general aggregate, for bodily injury, personal injury, and property damage. The policy must include contractual liability that has not been amended. Any endorsement restricting standard ISO "insured contract" language will not be accepted.

Automobile liability insurance. Contractor shall maintain automobile insurance at least as broad as Insurance Services Office form CA 00 01 covering bodily injury and property damage for all activities of the Contractor arising out of or in connection with Work to be performed under this Agreement, including coverage for any owned, hired, non-owned, or rented vehicles, in an amount not less than \$1,000,000 combined single limit for each accident.

Umbrella or excess liability insurance. [If required to meet higher limits]. Contractor may obtain and maintain an umbrella liability insurance policy with limits that will provide bodily injury, personal injury, and property damage liability coverage, including commercial general liability, automobile liability, and employer's liability. Such policy or policies shall include the following terms and conditions:

- A drop-down feature requiring the policy to respond if any primary insurance that would otherwise have applied proves to be uncollectible in whole or in part for any reason, other than bankruptcy or insolvency of said primary insurer;
- "Pay on behalf of" wording as opposed to "reimbursement";
- Concurrency of effective dates with primary policies.

Excess insurance. Should Contractor obtain and maintain an excess liability policy, such policy shall be excess over commercial general liability, automobile liability, and employer's liability policies. Such policy or policies shall include wording that the excess liability policy follows the terms and conditions of the underlying policies.

Workers' compensation insurance. Contractor shall maintain Workers' Compensation Insurance (Statutory Limits) and Employer's Liability Insurance (with limits of at least \$1,000,000). Contractor shall submit to City, along with the certificate of insurance, a Waiver of Subrogation endorsement in favor of City, its officers, agents, employees, and volunteers

Notice of cancellation. Contractor agrees to oblige its insurance agent or broker and insurers to provide the City with a thirty (30) day notice of cancellation (except for nonpayment for which a ten (10) day notice is required) or nonrenewal of coverage for each required coverage. If any of the Contractor's insurers are unwilling to provide such notice, then Contractor shall have the responsibility of notifying the City immediately in the event of Contractor's failure to renew any of the required insurance coverages or insurer's cancellation or non-renewal.

Additional insured status. General liability, automobile liability, and umbrella/excess liability insurance policies shall provide or be endorsed to provide that City and its officers, officials, employees, agents, and volunteers shall be additional insureds under such policies. Prohibition of undisclosed coverage limitations. None of the coverages required herein shall comply with these requirements if they include any limiting endorsement of any kind that has not been first submitted to City and approved of in writing.

Separation of insureds. A severability of interests provision must apply for all additional insureds ensuring that Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the insurer's limits of liability. The policy(ies) shall not contain any cross-liability exclusions.

Pass through clause. Contractor agrees to ensure that its subconsultants, subcontractors, and any other party who is brought onto or involved in the project/service by Contractor (hereinafter collectively "subcontractor"), provide the same minimum insurance coverage and endorsements required of Contractor. Contractor agrees to monitor and review all such coverage and assumes all responsibility for ensuring that such coverage is provided in conformity with the requirements of this section. However, in the event Contractor's subcontractor cannot comply with this requirement, which proof must be submitted to the City, Contractor shall be required to ensure that its subcontractor provide and maintain insurance coverage and endorsements sufficient to the specific risk of exposure involved with subcontractor's scope of work and services, with limits less than required of the Contractor, but in all other terms consistent with the Contractor's requirements under this agreement. This provision does not relieve the Contractor of its contractual obligations under the agreement and/or limit its liability to the amount of insurance coverage provided by its subcontractors. This provision is intended solely to provide Contractor with the ability to utilize a subcontractor who may be otherwise qualified to perform the work or services but may not carry the same insurance limits as required of the Contractor under this agreement given the limited scope of work or services provided by the subcontractor. Contractor agrees that upon request, all agreements with subcontractors, and others engaged in the project, will be submitted to City for review.

City's right to revise specifications. The City reserves the right at any time during the term of the contract to change the amounts and types of insurance required by giving the Contractor ninety (90) days advance written notice of such change. If such change results in substantial additional cost to the Contractor, the City and Contractor may renegotiate Contractor's compensation.

Self-insured retentions. Any self-insured retentions must be declared to and approved by City. City reserves the right to require that self-insured retentions be eliminated, lowered, or replaced by a deductible, or require proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention through confirmation from the underwriter.

Timely notice of claims. Contractor shall give City prompt and timely notice of claims made or suits instituted that arise out of or result from Contractor's performance under this Agreement, and that involve or may involve coverage under any of the required liability policies.

Additional insurance. Contractor shall also procure and maintain, at its own cost and expense, any additional kinds of insurance, which in its own judgment may be necessary for its proper

ATTACHMENT 4

Citation and Permit Management Systems Scope of Work

B. SCOPE OF WORK

1. Contractor Minimum Requirements

- 1.1 Contractor shall have five years' experience processing parking citations, with a total volume of more than 10,000 citations processed annually, providing management support systems, collections of delinquent citations, and coordinating activities with the California Department of Motor Vehicles.
- 1.2 Contactor shall have three years' experience providing call center customer service in a municipal or university parking environment, assisting customers with call-in issues (including providing information on parking permits and/or citations and providing guidance on appeal/adjudication processes).
- 1.3 Contractor shall have three years' experience providing mail-in processing in a municipal or university parking environment (including processing payments, establishing payment plans, and processing submitted appeals).
- 1.4 Contractor shall have five years' experience processing parking permits, with a total volume of more than 500 permits processed annually, providing management support systems, permit application and payment processing, and fulfillment of digital and/or physical permits.
- 1.5 Contractor shall have a minimum of 10 active clients located in the United States of America utilizing the proposed permit solution.
- 1.6 Contractor shall have legally operated in the United States of America for a minimum of five years.
- 1.7 Contractor's proposal and pricing will be valid for at least 180 days from submittal.

2. Citation Management System

2.1 Key Requirements:

- 2.1.1 Contractor shall provide a comprehensive web-based software solution that integrates citation related data, vehicle registered owner data, and complete records of all processing status and public contacts by phone or mail and is accessible to both the Contractor and the City staff.
- 2.1.2 CMS shall allow for full customization to the City specific Business Rules determined during the Design Review process. The City may change the Business Rules at its sole discretion which will be implemented by the Contractor within five business days.
- 2.1.3 CMS shall transfer citation data and photos from enforcement devices to the CMS software in real time and allow motorist to immediately pay a citation via all available payment channels.
- 2.1.4 CMS shall allow the creation of a temporary citation record in the situation where a motorist attempts to pay or contest a citation, but the citation has not yet been uploaded. Once the citation data from the handheld has been uploaded, the data from the temporary citation will be merged into the uploaded data and the temporary citation will be discarded.
- 2.1.5 Contractor and CMS shall file and store citations in an easily retrievable format for the City and State required timeframe.

ATTACHMENT 4

- 2.1.6 Allow for scofflaw and/or hot-list management to be integrated into the CMS and Enforcement Issuance software.
- 2.1.7 Contractor shall maintain real-time access to motor vehicle registries in California.
- 2.1.8 Contractor shall allow for access to other states and international registries to obtain registered owner information.
- 2.1.9 Contractor will be responsible for all fees associated with obtaining registered owner information.
- 2.1.10 CMS to provide a process and reporting for the City to validate DMV vehicle makes upon return of registered owner information from DMV to ensure proper make of vehicle issued citation.
- 2.1.11 CMS to provide a process and reporting for the City to review DMV No Hit lists to ensure that license plate and state have been entered correctly.
- 2.1.12 CMS to provide a process and reporting for the City to review duplicate citations and correct dates, violation codes, and fine amounts.
- 2.1.13 CMS shall provide functionality to manage rental car agency and fleet programs including the following:
 - 2.1.13.1 Store and track car rental agency and fleet vehicle reports of responsible billing parties from parking citations.
 - 2.1.13.2 Enrollment and maintenance of existing fleet accounts, including enrollment date, contact information, date of termination, enrolled vehicles, etc.
 - 2.1.13.3 Electronic invoicing and payment tracking.
- 2.1.14 CMS shall generate all notices and correspondence to be mailed based on the City's Business Rules.
- 2.1.15 CMS shall generate all notices and correspondence by batch or individually.
- 2.1.16 CMS shall allow entry of returned mail details and scanned copies of the returned items.
- 2.1.17 Contractor to provide an IVR service for phone payments.
- 2.1.18 Contractor to facilitate a robust Delinquent Collections Program.
- 2.1.19 Contractor shall import citation records issued prior to the execution of the contract at the City's instruction.
- 2.1.20 CMS shall allow for assigning permissions to access certain features based on user ID including limitations on the ability to correct dates, duplicate citations, violation codes, fine amounts, and suspension/dismissal codes.
- 2.1.21 CMS shall allow for customizable suspension, dismissal, and void codes/reasons. All codes shall have automation capabilities, allowing for the application and removal based on specific Business Rules dictated by the City.
- 2.1.22 CMS shall allow a record for citation voided in the field by an enforcement officer.
- 2.1.23 CMS shall allow for automation of invoicing, late fees, appeals, and collections with scheduler function.
- 2.1.24 CMS shall store and track previous and current owner information when a transfer of vehicle ownership has occurred by clearly notating in the account with changes, not limited to the source, old address, new address, date of owner transfer, etc.
- 2.1.25 CMS shall allow the maintenance and updating of a confidential vehicle database for exemptions authorized by the City linked to the parking enforcement handheld units.
- 2.1.26 CMS to allow for the processing and recording of refunds and reversals.
- 2.1.27 CMS shall provide full audit trail information for every processing transaction must be captured and retained for each citation until the related citation is purged from the system per the policies established by the City. All processing activities will be subjected to a detailed audit by the City.

ATTACHMENT 4

2.1.28 Contractor technical support available via phone and email.

3. CMS Software Requirements

The CMS shall allow the City to perform the following functions:

- 3.1 Entry of manually issued citations.
- 3.2 Query for citation data by any input field, including, but not limited to date, citation number, license plate number, name and address of registered owner and responsible party, citation location, enforcement officer, and VIN.
- 3.3 Access in an online, real-time mode at a minimum, but not limited to, the following:
 - 3.3.1 Summary Citation Data: citation number, state and license plate, parking meter number (if applicable), violation code with description, issue date and time, location, amount due, and current processing status.
 - 3.3.2 An electronic copy of the citation issued by the wireless electronic ticket writer.
 - 3.3.3 Issuing enforcing officer information.
 - 3.3.4 Vehicle Data: vehicle make/model, vehicle color, vehicle type, registered owner name, address as provided by DMV, and the effective date of vehicle ownership.
 - 3.3.5 Financial Data: the original fine amount plus any penalties or fees that have been added, such as a late payment penalty that includes the amount and exact date that the late payment penalty was imposed, returned check fee, or fee for obtaining a copy of a citation.
 - 3.3.6 Mail Data: the mail date, description, and copy of all notices or correspondence generated for the record as well as returned mail.
 - 3.3.7 Processing Data: the processing batch date and number (if applicable), digital imaging index (if applicable), the date on which the citation was updated to the CMS, the date registered owner information was requested and received from the vehicle registry, and the date that a registration hold was placed, confirmed, and released at the CA DMV. Each field must be clearly delineated and marked.
 - 3.3.8 Registry Data: the vehicle make as recorded by the DMV, the date on which ownership data was recorded, and dates that indicate returned mail or registration non-renewal.
 - 3.3.9 Adjudication Data: for administrative adjudication hearings, the date, time, office location, and disposition for in-person, telephone, video, and written declaration hearings for citations.
 - 3.3.10 Suspend and Dismiss Data: the date and time a temporary suspension is applied that stops normal processing, the ID of the person processing the suspension, the type of suspension, and the date the suspension will be removed.
 - 3.3.11 Correspondence Data: an imaged copy of all related correspondence as well as the date, time, code, and sufficiently detailed and readable description of all correspondence mailed relating to a citation along with the address used.
 - 3.3.12 Returned Mail Data: the date that any notice or correspondence was returned by the United States Postal Service as undeliverable. This shall include the address or addresses used. Multiple entries should be kept and used for skip-tracing efforts.
 - 3.3.13 Payment Data: payment date, payment type, payment source, amount, method of payment, payment batch number, and a copy of the check with appropriate security measures.
- 3.4 Pay or dismiss citations on one or multiple plates in one transaction.
- 3.5 Add notes to citations and plates.

ATTACHMENT 4

- 3.6 Attach documents to citation records.
- 3.7 Place citations on hold to suspend penalty and notice activity.
- 3.8 Generate notice and correspondence letters.
- 3.9 Void citations with custom City void codes.
- 3.10 Support for multiple vehicle owners.
- 3.11 View and print a copy of a citation and images/photos taken during citation issuance.

4. CMS Payment Plans

Payment plans are available for individuals who qualify based on the California Vehicle Code (CVC). Additional payment plans may be available based on the City's defined criteria. Once approved, the payment plan shall allow the total amount due to be paid in installments over a set period. The CMS shall include the ability to support the CVC and City required payment plans. The CMS shall have the following capabilities:

- 4.1 Create and manage payment plans in accordance with existing and future State, CVC, and City policies.
- 4.2 Allow motorists to apply for payment plans online, by mail, or in person.
- 4.3 Allow motorists to make a payment on a plan online, by phone, by mail or in person.
- 4.4 Allow motorist to save a debit/credit card for automatic payment on a plan on a schedule date for a scheduled amount.
- 4.5 Automatically generate payment plan amounts and dates based on City Business Rules.
- 4.6 Generate payment plan letters based on City Business Rules.

5. CMS Adjudication

Adjudication appeals and hearings will be processed by the City. The Contactor shall provide an adjudication module with the minimum following requirements:

- 5.1 Contractor shall provide functionality for the entire lifecycle of the appeals and adjudication process following prescribed timelines and processes for persons contesting parking citations per State of California law, CVC, and City policy.
- 5.2 Provide ability to process appeals online, in person, by phone, or by mail.
- 5.3 Allow assigned users the ability to initiate an appeals process on behalf of a motorist.
- 5.4 For contested citations, the CMS must be capable of showing the registered owner's name and address alongside the contestant's name and address if the contestant is not the registered owner.
- 5.5 Allow an action to suspend a citation while appeals are under investigation. This action should be automated in the case of owner-initiated appeals (such as online).
- 5.6 Allow for the recording of an appeal reason customizable by the City and include comments provided by the contestant.
- 5.7 Provide an appeals queue for the City to address appeals as they are received. Queue shall include filtering and sorting functionality.
- 5.8 Provide scheduler module for scheduling of appeal hearings.
- 5.9 Allow the input of comments to be attached to a record pertaining to the adjudication actions.
- 5.10 Allow the attachment and review of files and supporting evidence to a record pertaining to the adjudication process.
- 5.11 Allow the selection of a reason for appeal using a drop-down menu. Reasons shall be customizable by the City.

ATTACHMENT 4

- 5.12 Allow the adjudicator to record a case decision with suspension, dismissal, or liability codes. Codes shall be customizable by the City.
- 5.13 Generate and attach to the record, decision letters that can be printed, emailed or mailed to the recipient.
- 5.14 Generate and attach to the record a no-show (motorist did not attend appeals appointment) letter that can be printed, emailed, or mailed to the recipient.
- 5.15 Track all actions as part of the appeal and adjudication process, including person, time, and date for historical review.

6. CMS Department of Motor Vehicles (DMV)

Under California State law, the registered owner of a vehicle, as identified by the California DMV (or equivalent) where the vehicle is registered, is liable for all parking violations. The accurate and timely acquisition of registered owner information is critical to the success of processing citations, i.e., sending notices, collecting fines, and escalating to collections. For purpose of clarity, all references in this RFP to DMV mean any state(s) or province(s) motor vehicle registry unless the reference specifically states CA DMV to refer to the California Department of Motor Vehicles. The following is a list of requirements for DMV processing, including integration and interfacing:

6.1 DMV Data Integration

- 6.1.1 Contractor's CA DMV interface shall be real time, obtaining and importing registered owner's information to the CMS on a real time basis.
- 6.1.2 Contractor's out of state/international interfaces shall obtain and import registered owner's information to the CMS as soon as possible, but no more than 7 calendar days.
- 6.1.3 Contractor's DMV interfaces must be capable of inquiring through the DMV for registered owner information using either a VIN or the vehicle license plate number.
- 6.1.4 Contractor shall continuously attempt to retrieve registered owner information at regular intervals for all unpaid parking citations without registered owner information in the CMS at no additional cost to the City.
- 6.1.5 If data was not received or is incomplete, reporting must be provided to identify for follow-up of all incomplete or declined transactions.
- 6.1.6 In addition to the name and address of the registered owner of the vehicle cited, the vehicle identification number (VIN) must be obtained and presented in a format that permits a direct comparison with the last four digits of the VIN entered from an original parking citation.
- 6.1.7 CMS must store, update and maintain the following information:
 - 6.1.7.1 License plate: effective date of vehicle registration; and vehicle identification number (VIN).
 - 6.1.7.2 The dates on which DMV data were: (a) requested, (b) returned from DMV, and (c) confirmed or errors noted.
 - 6.1.7.3 The date that any holds were sent to CA DMV and subsequently released, if appropriate; the number of citations charged to the license plate that are currently confirmed and on hold at the CA DMV; and data on hold that have been released.
- 6.1.8 Contractor must track and inform the City of all additions, changes, and deletions to existing State and local laws affecting parking issues as soon as the Contractor learns of the change, but no later than two weeks after the change is approved (such as signed by the Governor, published by the City Clerk, notice issued by the DMV, etc.).

ATTACHMENT 4

- 6.1.9 Contractor must be able to make the necessary adjustments in its solution (hardware and software) to incorporate and modify all additions, changes, and deletions to the existing parking regulations and statutes.
- 6.1.10 CMS shall support DMV Registration Holds.
 - 6.1.10.1 The CA DMV allows local jurisdictions to add the fine amount for unresolved parking citations to the bill for annual vehicle registration renewal. This is called placing a hold on vehicle registration and is an effective means of securing payment of delinquent parking citations. Contractor must provide an online, real-time interface with CA DMV to place these "holds" for unpaid parking citations, to release the holds within 24 hours when a citation is resolved or a hearing is scheduled, and, if permitted by DMV, to reactivate a registration hold when appropriate as determined by the City.
 - 6.1.10.2 The information required by CA DMV must be automatically forwarded for registration hold processing, and receipt by CA DMV acknowledged.
 - 6.1.10.3 Reports are required to verify compliance.
- 6.1.11 When payment is received or suspend/dismal is applied to a record, Contractor must be able to release the registration hold at CA DMV within 24 hours.
 - 6.1.11.1 Reports are required to verify compliance.
 - 6.1.11.2 Release date must be noted in the citation record.
- 6.1.12 The citation history for each citation receiving a registration hold must be updated to indicate the most recent processing step in the hold cycle and hold history.
- 6.1.13 CMS must process and account for payment transactions associated with money collected by CA DMV.
- 6.1.14 Contractor's database must be updated with all citation payment transaction details, and the payment information received from DMV must be reconciled with the parking citation database.
- 6.1.15 Contractor shall be able to report on DMV hold and payment activities.

7. CMS Split-Plate Logic

- 7.1 CMS must reliably and automatically compare the issue date of each citation with the vehicle registration date information on file at the DMV. This is especially important in states such as California, where the license plate stays with the vehicle rather than with the owner.
 - 7.1.1 CMS must use registration date information to assign legal responsibility for each citation to a registered owner based on the effective date the license was assigned to a particular individual by a motor vehicle agency.
 - 7.1.2 Citations issued before a change in registered owner must be assigned to the previous owner.
- 7.2 Registration updates shall be made as frequently as possible and immediately updated in the CMS.
- 7.3 CMS must accommodate manual correction of incorrect entries.
- 7.4 CMS must provide an online, real-time display of multiple citation records for a single plate, split by date of ownership.

8. CMS Customer Portal

Contractor shall provide a customer-friendly portal to provide access to parking citation information, adjudication and payment. The website does not have to be white labeled, however some City customization would be preferred including a logo and City contact information with a link to the City parking website. The following is a list of requirements for the portal:

ATTACHMENT 4

- 8.1 Portal shall be fully hosted by the Contractor and fully integrated with the Contractor's CMS in real-time.
- 8.2 Portal shall be available 24 hours per day, 7 days per week.
- 8.3 Portal must be accessible on multiple browser platforms, including MS Edge, Google Chrome, Safari, and Firefox.
- 8.4 Portal shall be PCI compliant for online payment acceptance.
- 8.5 The City shall approve the application of any convenience fees.
- 8.6 Portal shall allow the email of receipts and correspondence.
- 8.7 Portal shall comply with all applicable ADA standards and requirements.
- 8.8 A motorist shall be able to complete the following actions via the portal:
 - 8.8.1 Search for a citation by license plate, citation number, VIN or payment plan.
 - 8.8.2 View a copy of a citation, related photos, and citation notes.
 - 8.8.3 Pay a citation and all related fees.
 - 8.8.4 Initiate an Initial Review of a citation.
 - 8.8.5 Initiate a Hearing for a citation.
 - 8.8.6 Request a payment plan and upload supporting documentation.

9. CMS Mail-In Payment Processing

The accurate processing of mail-in payments is critical and directly affects subsequent collection actions, such as the application of late penalties, delinquent noticing; and applying registration holds at the CA DMV. The following is a list of requirements for mail in payment processing:

- 9.1 Contractor will maintain an address in California for mail-in payments.
- 9.2 Contractor will process all mail-in payments within two business days of receipt.
- 9.3 All payment documents received and processed must be copied and archived to be promptly retrievable as required by law and CVC.
- 9.4 Contractor shall process payments in a secure environment with the appropriate security, surveillance, and oversight.
- 9.5 Any Subcontractors utilized for processing mail in process will be appropriately experienced, certified, licensed and bonded, as applicable.
- 9.6 Mail-in payment processing must include a broad range of control and procedures to ensure accurate and timeline processing including audit trails for processing, endorsing and depositing payments.
- 9.7 All payments will be accurately recorded in the CMS. Contractor will perform audits to ensure accuracy.
- 9.8 Funds for deposit must be prepared, documented and provided to the City in a manner that allows the City to receive, record, and audit deposits.
- 9.9 Records for every deposit must be maintained and stored.
- 9.10 Contractor shall be held completely and solely responsible for ensuring the integrity and security of City revenue throughout the entire processing procedure. Any shortages or losses will be the exclusive responsibility of the Contractor and shall be fully reimbursed to the City. Overages must be researched and resolved in every case. Appropriate refunds shall be provided to any entitled parties within timeframes established by the CVC.
- 9.11 Any mail or correspondence incorrectly received by the Contractor, but addressed to the City, will be forwarded to the City in a timely manner.
- 9.12 The Contractor shall provide reporting on mail in processing statistics such payments received, quantities, and more.

ATTACHMENT 4

10. CMS Reporting

It is essential that the overall system properly processes and report on all activities and transactions. The Contractor must provide a robust and comprehensive reporting package as part of the CMS solution. The following is a list of requirements for the Contractor's reporting package:

- 10.1 Contractor must provide comprehensive, detailed, accurate, and timely management, financial, and operational on-line, real-time, and other reports for City management.
 - 10.1.1 Batch reporting shall be acceptable for large amounts of data only.
- 10.2 Contractor's reporting shall be able to query reports by multiple filters such as date, channel, citation, etc.
- 10.3 Contractor's reporting shall allow for the set up automated reports.
- 10.4 Reports shall be exportable in pdf and/or excel/csv format.
- 10.5 Reporting shall be available on the following topics:
 - 10.5.1 Revenue and payments for all channels
 - 10.5.2 Mail payment deposit and reconciliation
 - 10.5.3 Financial adjustments, refunds, etc.
 - 10.5.4 Payment plans
 - 10.5.5 Adjudication
 - 10.5.6 DMV processing and holds
 - 10.5.7 Split plate and make/match failures
 - 10.5.8 Citation issuance
 - 10.5.9 Issuing officer session activity
 - 10.5.10 Citation aging and delinquency
 - 10.5.11 Notice and correspondence activity
 - 10.5.12 IVR activity
 - 10.5.13 Delinquency collection activity
 - 10.5.14 Accounts receivables
 - 10.5.15 FTB activity
- 10.6 Support reporting at the end of each Fiscal Year, in accordance with CVC Section 40200.3(b) setting forth the number of cases processed, and all financial and/or citation payments received and distributed, along with any other information that may be required by the issuing agency.

11. CMS Financial Processing

It is essential that the overall system properly processes and record all financial aspects of related activities and transactions. It must provide accurate accounting of each transaction and ensure that funds are properly deposited or forwarded.

11.1 Key Requirements

The following is a list of requirements for financial processing:

- 11.1.1 Full data shall be captured for every payment processed by the any component of the overall system, including but not limited to:
 - 11.1.1.1 Payment amount
 - 11.1.1.2 Source (mail, walk-in, pay-by-phone, pay-by-web, DMV, FTB, etc.)
 - 11.1.1.3 Method of payment (cash, check, money order, credit card, etc.)

ATTACHMENT 4

- 11.1.1.4 Payment processing date
- 11.1.1.5 Original fine amount
- 11.1.1.6 Late payment penalty (including exact date that late payment penalty was imposed)
- 11.1.1.7 Second late payment penalty
- 11.1.1.8 Total paid
- 11.1.1.9 Total reduced
- 11.1.1.10 Total due
- 11.1.1.11 Amount overpaid
- 11.1.1.12 Reason for overpayment including all data processing support required to meet the City's legal obligation to refund overpayments
- 11.1.1.13 Refund check or credit issuance date
- 11.1.1.14 Refund check issuance mail date
- 11.1.2 Lockbox Operation: The Contractor must maintain a lockbox operation sufficient to process all lockbox payments within two business days of receipt.
- 11.1.3 All payment and transaction data must be in an on-line, real-time environment, including on-line inquiry of payment documents.
- 11.1.4 CMS must provide a clear auditable record of payments received. The audit trail must include citation number, payment date and time, payment amount, payment method, and the name or ID of the staff member that accepted payment and made the entry.
- 11.1.5 All transactions are subject to audit by the City at any time without advance notice.
- 11.1.6 CMS must be able to process City-imposed fees, including bounced check or other fees.
- 11.1.7 CMS must allow on-line payment adjustments and error corrections with audit trails.

12. CMS Bank Cards

The following is a list of requirements related to bank card acceptance:

- 12.1 Motorists shall be able to use credit/debit cards for any type of payment for the services under the contract.
- 12.2 Contractor will provide a payment gateway for processing of bank cards which is capable of processing Visa, Mastercard, American Express and Discover.
- 12.3 Contractor will integrate with the City's current merchant processor, Chase Bank.
- 12.4 Contractor will allow the City to change the merchant processor in the future for no cost.
- 12.5 Contractor solution and all related components shall all be compliant with Payment Card Industry Data Security Standard (PCI Level 1 certified by a Qualified Security Assessor (QSA)) as applicable.

13. CMS Financial Adjustments

The following is a list of requirements related to financial adjustments:

- 13.1 CMS must permit the input of financial adjustment transactions, such as, but not limited to, returned checks, charge backs, reversals, or refunds.
- 13.2 Adjustments may include reversing an entire payment, modifying a payment amount, altering the amount due to close a citation, and reopening a citation.

ATTACHMENT 4

- 13.3 CMS will generate appropriate notification letters which are automatically sent to the appropriate party advising of any actions.

14. CMS Citation Issuance Devices & Software

The City currently provides and uses 13 Android and iOS devices as handheld citation issuance devices supported by 10 Seiko II Bluetooth printers. To the extent possible, the City may elect to continue use of the devices. The City may also choose to replace existing equipment. Thus, the Contractor shall propose an option for both scenarios.

14.1 Enforcement Handhelds

Contractor shall propose a hardware solution that represents the current state of mobile wireless device technology and data management. Contractor may propose one or both of the following options:

- A handheld device with a separate printer.
- An all-in-one or single-piece handheld device where the printer and handheld are attached.

The following is a list of requirements for handheld issuance devices:

- 14.1.1 Handheld and printer must be inclusive of the protective infrastructure to ruggedize and protect equipment from working conditions and outdoor elements.
- 14.1.2 Handheld and printer shall be able to withstand drops, be water resistant, and have appropriate screen protection and appropriate grip control.
- 14.1.3 The life span of all devices shall be at least three years with proper use.
- 14.1.4 The cellular communications on any handheld device provided to the City during the term of the contract shall have a life span of at least 5 years.
- 14.1.5 Contractor shall provide support for all devices for the agreement term, including hardware, operation system software and communication plans.
- 14.1.6 Handheld and printer Batteries shall last for an entire shift (up to 11 hours); supplemental in-field replaced battery packs or mobile charging will be acceptable.
- 14.1.7 Handheld devices shall include a camera with a minimum resolution of 8 megapixels, able to take photos in all lighting conditions and be able to geotag the photos taken.
- 14.1.8 Handheld and printer shall have an optional carrying case.
- 14.1.9 Handheld devices shall include Wi-Fi, Bluetooth, and GPS capability.
- 14.1.10 Should advancements in cellular technology or end-of-life require new devices, the Contractor will provide at least one year's notice to the City and provide reasonably priced options for upgrades.
- 14.1.11 In the case of separate components, printers shall include Bluetooth capability and shall not require a physical connection to the handheld for operations.
- 14.1.12 Handheld devices shall include functionality that prevent usage of the device as a telephone or allow calling only to specific phone numbers, as directed by the City.
- 14.1.13 Handheld devices shall include functionality that prevent use of SMS/text capability unless limited to specific numbers, as directed by the City.
- 14.1.14 Handheld devices shall include functionality that allow the device restricted so that users in the field cannot add or remove apps/software, unless directed by the City.

ATTACHMENT 4

14.2 Citation Issuance Software

The following is a list of requirements for handheld issuance software:

- 14.2.1 The following fields, at a minimum, must be captured during citation issuance by the Contractor's enforcement software:
 - 14.2.1.1 Citation number
 - 14.2.1.2 License plate
 - 14.2.1.3 Where plate is not available, a field for up to 17-digit VIN shall be provided
 - 14.2.1.4 License expiration Year/Month, Body Type (DMV specific), Vehicle Make, Vehicle Color
 - 14.2.1.5 Meter Number field
 - 14.2.1.6 State
 - 14.2.1.7 Last four digits of VIN
 - 14.2.1.8 Violation code and description (up to three)
 - 14.2.1.9 Location of violation, including City defined zone
 - 14.2.1.10 Issue date
 - 14.2.1.11 Issue time
 - 14.2.1.12 Officer ID
 - 14.2.1.13 Officer name
 - 14.2.1.14 Notes to print on citation (known as external notes)
 - 14.2.1.15 Officer notes, not visible to the public (known as internal notes)
 - 14.2.1.16 Electronic marking (tire chalking)
 - 14.2.1.17 Photos, videos, and audio
- 14.3 Software shall have the ability to support pay-by-plate, pay-by-space, permit status, and mobile payments.
- 14.4 Software shall provide the ability to validate disabled placards with DMV look-up.
- 14.5 Software shall provide a user-friendly interface for ease of use and durability.
- 14.6 Software shall require a password/security sign-in to prevent unauthorized use
- 14.7 Software shall allow the user to view and void any citation written by the user in the active session.
- 14.8 Software shall support voiding a previously issued citation that requires a City-defined reason/code and input of explanation.
- 14.9 Software shall support the reprinting of an issued citation that is identical to the original.
- 14.10 Software shall automatically transfer and upload citations issued by the handheld to the CMS in real-time, including any audio and/or picture associated with the citation.
- 14.11 Software shall not allow an officer to attempt to issue a citation unless all required fields have been entered with valid information. For example, a citation with no violation code or no license plate or VIN cannot be created.
- 14.12 Upon entering a license plate during citation entry, software shall automatically search necessary lists (scofflaw, permit, hotlist, stolen vehicle, etc.) for a match.
 - 14.12.1 If a match is found, the appropriate information will display on the handheld screen.
- 14.13 Software shall support monitoring of vehicles in a fixed time limit zone across accessible to all handhelds in use at any one time. This shall allow for multiple Officers to enforce time limits in location at the same time.
- 14.14 Software shall accurately time and date stamp transactions by the system's master clock.

ATTACHMENT 4

- 14.15 Software shall support the issuance and tracking of warning notices as well as actual citations including issuance history by license plate.
- 14.16 Software shall support standard location codes or block faces and descriptions. Locations shall also be manually generated when necessary.
- 14.17 Software shall support multiple citation number sequences and formats.
- 14.18 Software shall Support CA CVC requirements for Drive-Away citations including allowing a citation to be marked as a drive-away.
- 14.19 At a minimum, software shall allow the selection of the previous location for a new citation, otherwise support geofencing capability to auto-populate locations.
- 14.20 Software shall support real-time tracking of officer location based on GPS coordinates.
- 14.21 Software shall support photos taken as part of the citation process shall be maintained within the citation app and uploaded to the CMS, not simply placed on the device's camera roll.
 - 14.21.1 The City shall be able to set a minimum number of photographs that must be taken for each citation.
 - 14.21.2 If the Contractor has a maximum number of photographs per citation, it must be greater than 10.
- 14.22 Provide a set of pre-fixed text lines to go in the notes (both printed and internal); when the officer is completing the notes, they can pick from city-defined pre-established text lines or use free-from text entry.
- 14.23 Solution shall integrate with LPR systems so that any hit on the mobile LPR can be transferred seamlessly to the handheld, including associated LPR images.
- 14.24 Software shall allow a user to cancel a citation or warning that has not been completed (e.g., the citation has not been printed or marked as drive-away).
- 14.25 Software shall support an Officer activity log with the ability for the Officer to record issues or notes in the field.
- 14.26 Print a complete citation or warning ticket, including the following fields on the front:
 - 14.26.1 Citation or warning number
 - 14.26.2 Date and time issued
 - 14.26.3 Badge number and name of issuing officer
 - 14.26.4 Location where citation issued
 - 14.26.5 Violation code for which the citation is being issued
 - 14.26.6 Violation description
 - 14.26.7 Violation amount
 - 14.26.8 State surcharge
 - 14.26.9 Total amount due
 - 14.26.10 Vehicle license plate or full VIN
 - 14.26.11 Last 4 digits of the VIN
 - 14.26.12 Vehicle registration expiration date
 - 14.26.13 Vehicle make
 - 14.26.14 Vehicle color
 - 14.26.15 Vehicle type
 - 14.26.16 Public notes

15. CMS Noticing, Correspondence, and Collections

The Contractor will provide mail processing and services as well as mail in payment processing for the City. The accurate processing of noticing and correspondence is critical and directly affects timely

ATTACHMENT 4

payments, subsequent collection actions, such as the application of late penalties, delinquent noticing; and applying registration holds at the CA DMV.

15.1 Notice Mailing

The following is a list of requirements for noticing and correspondence mail:

- 15.1.1 All noticing and correspondence activity will follow the City Business Rules as recorded during the Design Review process.
- 15.1.2 All noticing will be accurately recorded in the CMS. Contractor will perform audits to ensure accuracy.
- 15.1.3 Contractor shall process and mail reminder notices for unpaid citations including out-of-state owners.
- 15.1.4 Contractor shall process and mail delinquent notification to the lessee and/or secondary owner when delinquent and following the lien process under California state law.
- 15.1.5 Contractor shall generate and mail citation correction notices where the issuing officer determines that there is incorrect data in the parking citation.
- 15.1.6 Contractor shall generate and mail notices to lessees or renters of cited vehicles, including loaner vehicles, when provided with proof of written lease or rental agreement as required by the CVC.
- 15.1.7 Contractor shall generate and mail Drive Away notices to registered owners of vehicles that drive away prior to the issuing officer attaching the citation to the vehicle. The notice must be mailed out to the registered owner within fifteen (15) calendar days of the citation issuance as required by the CVC.
- 15.1.8 Contractor shall generate and mail correspondence regarding initial review and hearing decisions as part of the adjudication process.
- 15.1.9 Contractor shall record when mail is returned as not deliverable. Returned envelope and correspondence and/or notice must be scanned and imaged into the CMS.
- 15.1.10 Contractor must provide automated noticing and mail notices to comply with all City procedures and CVC requirements for scheduling and conducting administrative hearings.
- 15.1.11 Contractor shall process and mail "No Show" letters for constituents who do not appear for their scheduled hearing. The design logic will also prevent a no-show letter generated if the case has been "rescheduled" or "continued" or adjudicated.
- 15.1.12 Contractor shall generate and mail payment plan letters initiated on the Customer Portal or by City staff.
- 15.1.13 All noticing or correspondence must operate with accurate and timely record keeping that includes, but is not limited to, time stamping of all communication. Time stamps must include pertinent and relevant specific information such as date, time, name, and location. Any correspondence sent to a motorist and/or returned from a motorist must be actively logged to ensure record keeping is accurate and up to date.
- 15.1.14 Contractor will ensure all outgoing mail is be postmarked.
- 15.1.15 Contractor shall provide reporting on noticing and correspondence statistics such quantities, types, return mail, and more.

15.2 Telephone Services

ATTACHMENT 4

The Contractor will provide an IVR telephone service to allow motorists to inquire about and make payment on a citation. The following is a list of requirements for IVR telephone service:

- 15.2.1 Contractor shall provide a sophisticated, flexible, and responsive 24 hours a day, 7 days a week, telephone answering system and all necessary hardware components, operational software, and technical support for the Interactive Voice Response (IVR) system.
- 15.2.2 The related phone number must be toll free to the caller.
- 15.2.3 IVR solution must be PCI compliant for bank card payment processing.
- 15.2.4 IVR should be available in both English and Spanish service.
- 15.2.5 IVR should allow for some customization whereas a caller will be easily aware of which City they are calling about.
- 15.2.6 IVR should be easily used, customer friendly and allow for the fewest steps possible.
- 15.2.7 IVR solution shall be compatible with Telephone Device for the Deaf (TTD) for use by callers with a hearing impairment.
- 15.2.8 IVR shall allow, at minimum, the vocal listing of the City's customer service phone.
- 15.2.9 IVR shall be integrated with the Contractor's CMS for real-time updating of payments received over the phone.
- 15.2.10 Contractor shall be able to report on call statistics such calls received, calls dropped, payments received and more.

15.3 Delinquent Collections

The Contractor will provide and support a delinquent collections program to maximize the collection of past due citation payments. The City does not endeavor to create a punitive relationship with motorists, but instead encourage compliance with the law and parking program regulations. The following is a list of requirements related to delinquent collections:

- 15.3.1 Contractor shall provide and manage an effective special collection program, including a collections software system, and make diligent, cost-effective efforts to collect the City-assigned delinquent accounts.
- 15.3.2 The City shall approve Business Rules prior to activating a delinquent collections program. Business rules will include plans, notices, timelines, and activities related to delinquent collections.
- 15.3.3 Contractor shall follow and implement procedures to consistently abide by local, state and federal laws request collections activities.
- 15.3.4 Contractor must adhere to nationally accepted professional standards for collection activities and ensure the professional quality, technical quality, timely completion, and effective coordination of all secondary collection services furnished by its officers, employees, agents and subcontractors.
- 15.3.5 Contractor shall fully comply with the Fair Debt Collection Practices Act, Fair Credit Report Act and all other applicable federal statutes, regulations, rules, and standards, plus all applicable California fair debt collection practice and consumer protection laws and regulations, and applicable licensing and accreditation standards for collection agencies.
- 15.3.6 Contractor shall be capable of importing and collecting on citations issued prior to contract execution.

ATTACHMENT 4

- 15.3.7 Contractor shall continuously perform the debtor identification through DMV look up, forward address monitoring, and advanced skip tracking.
- 15.3.8 Contractor shall mail delinquent collection notices in line with City Noticing and Correspondence Requirements.
- 15.3.9 Contractor shall manage DMV registration holds.
- 15.3.10 Contractor shall manage Franchise Tax Board (FTB) Intercept Program.
- 15.3.11 Contractor shall manage outbound calling efforts.
- 15.3.12 Contractor shall enable payment of debts through all channels required throughout this RFP.
- 15.3.13 Contractor shall update and maintain records in the CMS regarding all delinquent collection efforts in real-time. In the case of the use of secondary collection subcontractor, the City may approve batch updates made at reasonable timeframes.
- 15.3.14 Contractor shall be able to report on Delinquent Collection efforts such as mailings, calls, collection technique success and more.
- 15.3.15 Contractor shall be able to report on Delinquent Collections including quantities, values, dates and more.
- 15.3.16 In all cases, the only fees that will be paid by the City to Contractor for Delinquent Collections activities will be a subset of those amounts actually received, deposited, and paid to the City.
- 15.3.17 Contractor shall be responsible for any and all expenses related to delinquent collections.
- 15.3.18 If the expense is passed on to and paid by the violator, the Contractor shall be reimbursed with the expense.
- 15.3.19 At the City's discretion, the Contractor will support the City in processing of writing off citations as approved by City Management or Council.

15.4 Difficult to Collect Cases

There are several categories of citations that require additional handling and collection efforts because they have remained unresolved despite all other collection efforts. The Contractor shall make efforts for the following types of collections.

- 15.4.1 DMV ownership transfers - These are citations where the DMV has indicated a transfer of ownership from the individual on record, with no additional ownership data.
- 15.4.2 DMV Make-Match failure - These are citations which have a vehicle make that does not match the make registered with the DMV.
- 15.4.3 DMV Hold Reject - These are citations issued against vehicles for which registration hold requests were rejected due to some data not matching DMV files.
- 15.4.4 No Registry Confirm - These are citations for which no owner name and address were obtained from the DMV.
- 15.4.5 Aged Registration Hold - These are citations issued against vehicles that have been placed on registration hold but have passed their registration expiration date and have not responded.
- 15.4.6 Declaration of Non-Ownership - These are citations wherein a motorist has submitted a declaration of non-ownership stating they were not the owner of the vehicle at the time of the parking citation.
- 15.4.7 No Address Found - These are citations wherein the current address was identified as undeliverable.

ATTACHMENT 4

15.4.8 Rental - These are citations issued to rental vehicles and the motorist renting the vehicle was identified by the rental company but has not paid the citation.

15.5 FTB Intercept Program

- 15.5.1 Contractor shall manage the interface and certification for Franchise Tax Board (FTB) Intercept payments on behalf of the City.
- 15.5.2 Contractor shall manage FTB submission process in a timely manner, adhering to all FTB guidelines and State of California policy and law.
- 15.5.3 Contractor shall properly identify and collect required data for eligible records to be submitted to FTB.
- 15.5.4 Contractor shall generate and send mail notifications prior to file submission as required.
- 15.5.5 Contractor shall receive and process FTB files, updating the CMS on a real time basis.
- 15.5.6 Contractor shall provide timely modification/notification to the intercept program if the amount to be intercepted has changed.
- 15.5.7 Contractor shall assist in processing timely refunds in the event of overpayment or misidentification.
- 15.5.8 Contractor shall be able to report on FTB activities.

16. Permit Management System

16.1 Key Requirements

The following is a list of key requirements for the PMS solution:

- 16.1.1 PMS shall be online, cloud-based, and not require any installation of software, accessible from any PC with a web browser.
- 16.1.2 PMS shall update in real time.
- 16.1.3 PMS shall allow for full customization to the City specific Business Rules determined during the Design Review process. City may change the Business Rules at its sole discretion which will be implemented by the Contractor within five business days.
- 16.1.4 Contractor solution and all related components shall all be compliant with Payment Card Industry Data Security Standard (PCI Level 1 certified by a Qualified Security Assessor (QSA)) as applicable.
- 16.1.5 PMS solution will provide a payment gateway for processing of bank cards which is capable of processing Visa, Mastercard, American Express and Discover, which will integrate with the City's current merchant processor, XXX.
 - 16.1.5.1 Contractor will allow the City to change the merchant processor in the future for no cost.
- 16.1.6 PMS shall allow for assigning permissions to access certain features based on user ID.
- 16.1.7 PMS shall support both physical and virtual parking permits tied to a license plate.
- 16.1.8 PMS shall support the ability to prevent permitting processing and issuance when a motorist has citation related amounts due to the City.
- 16.1.9 PMS shall generate renewal and cancellation notices to be sent by mail and email.
- 16.1.10 PMS shall generate renewal and cancellation notices by batch or individually.
- 16.1.11 PMS shall generate acceptance or denial of permit applications notices to be sent by mail and email.
- 16.1.12 PMS shall generate a unique permit number.
- 16.1.13 PMS shall allow the addition and removal of any permit types.
- 16.1.14 PMS shall allow for multiple parking permits zones and districts.

ATTACHMENT 4

- 16.1.15 PMS shall provide functionality for guest parking permits.
- 16.1.16 PMS shall support rolling expiration data (daily, weekly, monthly, annually, date-to-date).
- 16.1.17 PMS shall support exception permit processing and quantity limitations with time period parameters.
- 16.1.18 PMS shall restrict and allow multiple permits to be assigned to one license plate.
- 16.1.19 PMS shall support multiple permit pricing structures including flat, prorated, and tiered pricing.
- 16.1.20 PMS shall support multiple permit waitlists.
- 16.1.21 An authorized user shall be able to conduct the following actions in the PMS:
 - 16.1.21.1 Create a new permit holder account.
 - 16.1.21.2 Enter or create permits assigned to a motorist.
 - 16.1.21.3 Correct, Autofill, or standardize address entries.
 - 16.1.21.4 Validate permit program eligibility based upon supporting documentation.
 - 16.1.21.5 Approve or deny parking permit applications based on geographical (address) location or requested permit or by other City determined factors.
 - 16.1.21.6 View and manage permit request queue, listing permits requiring review for approval.
 - 16.1.21.7 View and manage permit waitlists including adding or removing waitlist requests.
 - 16.1.21.8 Process payments for permits.
 - 16.1.21.9 Process refunds for permits
 - 16.1.21.10 Process multiple permits in one transaction.
 - 16.1.21.11 Query by account name, account number, permit type, permit number, license plate number, and address.
 - 16.1.21.12 Add notes to permit accounts with no limitation.
 - 16.1.21.13 Edit account information and permit information.
 - 16.1.21.13 Cancel an existing permit.
 - 16.1.21.14 Print temporary permits.
 - 16.1.21.15 Print, mail or email correspondences to permit holds
- 16.1.22 PMS shall provide full audit trail information for every processing transaction must be captured and retained for each permit until the permit is purged from the system per the policies established by the City. All processing activities will be subjected to detailed audit by the City.

16.2 PMS Customer Portal

Contractor shall provide a customer-friendly portal to provide access to parking citation information, adjudication and payment. The website does not have to be white labeled, however some City customization would be preferred including a logo and City contact information with a link to the City parking website. The following is a list of requirements for the portal:

- 16.2.1 The portal shall be fully hosted by the Contractor and integrated with the Contractor's PMS in real-time.
- 16.2.2 The portal shall be available 24 hours per day, 7 days per week.
- 16.2.3 The portal must be accessible on multiple browser platforms, including MS Edge, Google Chrome, Safari, and Firefox.
- 16.2.4 The portal shall be PCI compliant for online payment acceptance.
- 16.2.5 The City shall approve the application of any convenience fees.

ATTACHMENT 4

- 16.2.6 Contractor s website shall comply with all applicable ADA standards and requirements.
- 16.2.7 Provide customers with email messages regarding the approval or status of their permit.
- 16.2.8 A motorist shall be able to complete the following actions via the portal:
- 16.2.9 Purchase and/or request an annual, visitor or guest permits with qualifying documentation.
- 16.2.10 Request placement on a permit waitlist.
- 16.2.11 View status of position on a waitlist.
- 16.2.12 Remove placement from a waitlist.
- 16.2.13 Process payment for a waitlist position or permit.
- 16.2.14 Renew an existing permit.
- 16.2.15 Cancel a permit.
- 16.2.16 Update permit information (e.g., license plate number, make, model, color, and address) as allowable by a permit type.

16.3 PMS Reporting

The following is a list of requirements regarding reporting for the PMS:

- 16.3.1 Contractor shall provide comprehensive, detailed, accurate, and timely management, financial, and operational on-line, real-time, and other reports for City management.
- 16.3.2 Batch reporting shall be acceptable for large amounts of data only.
- 16.3.3 PMS reporting shall provide the ability to query reports by multiple filters including date.
- 16.3.4 PMS reporting shall provide reporting on permitting statistics such quantities, types, and more.
- 16.3.5 PMS reporting shall be exportable in pdf and/or Excel/CSV format.

17. Warranty and Support Services

The following is a list of requirements for the CMS solution Warranty and Support:

- 17.1 Contractor shall include a minimum of a one-year hardware warranty for any hardware delivered to the City.
- 17.2 Contractor shall provide extended hardware warranty options.
- 17.3 Contractor shall provide a warranty on all software and system solutions for the term of the contract.
- 17.4 Contractor shall provide ongoing support services through the term of the contract, including a toll-free phone number and online help (Help Desk). Support services shall be available from 8am to 5pm Pacific Time Zone reasonable hours, seven days per week (excluding holidays).
- 17.5 Any requests for support that cannot be handled immediately by the Help Desk shall be acknowledged by the Contractor within one business day and updated on a regular basis.
- 17.6 Contractor s support services must be provided by a staff of experienced, well-trained technicians.
- 17.7 Contractor shall utilize a ticket tracking system to open, track and close support requests from the City.

ATTACHMENT 4

- 17.8 Contractor shall provide regular and ongoing technical bulletins that identify product notifications, technology updates, lessons learned, and/or system performance that detail issues, changes, improvements, and upgrades.

18. Project Management

The Contractor shall provide Project Management services during the design, build and implementation of the Contractor's solution. The following is a list of requirements regarding Project Management for solution delivery:

- 18.1 Contractor shall assign a Project Manager for the duration of the planning, implementation, delivery and installation portion of the contract who will be responsible for, including but not limited to:
- 18.1.1 Project oversight and delivery of the system.
 - 18.1.2 Being a single point of contact for the City and providing for the management, implementation, and on-going trouble shooting of the System during its installation.
 - 18.1.3 Coordinating efforts with the City and any subcontractors.
 - 18.1.4 Being available as required for onsite work and otherwise available to the City during regular business hours via email, phone or video conference to respond to City needs, questions and or issues.
 - 18.1.5 Developing and maintaining, in consultation with the City, a detailed implementation and project plan for the System.
- 18.2 Contractor's Project Manager shall be experienced in the Contractor's solutions, parking operations, and all related laws and codes pertaining to citation management in California. The Project Manager shall be able to provide guidance and suggestions to the City on best practices.
- 18.3 Contractor shall provide a Design Review process for the customizable and configurable portions of the solution. The Design Review process will result in a Business Roles document that the City shall approve. The Business Rules will be the guidelines and rules for all activities and work related to delivering the scope of the resulting agreement.
- 18.4 Contractor shall test all hardware, software and systems prior to delivery to the City.
- 18.5 Contractor shall support the City in testing all hardware, software and system prior to implementation.
- 18.6 Contractor shall develop a training plan for review and approval by the City.

19. Training

The Contractor will provide comprehensive training are part of the solution implementation. The City requires training for multiple teams and departments. The following is a list of requirements:

- 19.1 Contractor shall provide a training plan that includes but is not limited to all functionality of CMS operations, adjudication, enforcement devices, citation issuance software, web portal operations, noticing and correspondence operations, IVR operations, and reporting. The training plan shall include:
- 19.1.1 Types of training course with a target audience
 - 19.1.2 Description of course
 - 19.1.3 Length of course
 - 19.1.4 Method of training (video conference, in person, etc.)
 - 19.1.5 Prerequisites for the training course

ATTACHMENT 4

- 19.2 Contractor shall provide training in person or via video conference as is the most appropriate for the topic. At a minimum, Contractor will provide at least two days of onsite/in person training.
- 19.3 The City may request additional training sessions at reasonable intervals and lengths via video conference for no additional cost for the term of the contract.
- 19.4 Contractor will provide the necessary training to the City for any new, upgraded or additional functionality provided during the term of the contract.
- 19.5 The City may request additional training sessions in person. Contractor will provide a quote for services within one week, and perform that training within four weeks, of the City's request.
- 19.6 Contactor shall supply and keep current digitals copies of all operations, training, and user manuals, which include detailed instruction for the operation of the entire solution.

20. Integration Requirements

The following is a list of requirements for the integrations to be part of Contractor s CMS solution:

- 20.1 Contractor shall provide real-time integration with the City's current, new, and future parking technology and data management Contractors, which currently includes:
 - 20.1.1 LPR - Genetec/ Route 1
 - 20.1.2 Pay by Plate pay stations – IPS
 - 20.1.3 Mobile payment applications – Honk, PayByPhone, ParkMobile
- 20.2 Contractor shall be able to work with outside Contractors to perform data migration, if required by the City
- 20.3 Contract will review and comply with the additional data, system and security requirement in Attachment B.

21. Other Citation Related Services (Optional)

The City is interested in reviewing proposals for turn-key services. The following requirements will be considered optional; however, Contractors are encouraged to submit proposals that include one or more of these options. The Contractor shall include a full description of their services related to each option, including any City prerequisites, and complete pricing for these services. Each service shall be accompanied by a comprehensive reporting package that will allow the City to monitor the Contractor's operation. The City reserves the right to negotiate reasonable service level agreements for each service.

- 21.1 First line call center to respond to motorist questions or concerns regarding citations, including the scheduling of hearings. Exceptions to be forwarded to the City for handling via the CMS online platform. Call center shall be available Monday through Friday between the hours of 8am and 5pm PST, excluding City holidays.
- 21.2 Processing all in bound mail, including mail in appeals including the provision and management of California address. Contractor will process requests based on City approved Business Rules or forward the request to the City for handling via CMS online processing.
- 21.3 Entry of Manual Citations.
- 21.4 Provide citation paper stock to include a design and text provided by the City.

22. Other Permit Related Services (Optional)

ATTACHMENT 4

The City is interested in reviewing proposals for turn-key permit processing and fulfillment services. The following requirements will be considered optional; however, Contractors are encouraged to submit proposals that include one or more of these options. The Contractor shall include a full description of their services related to each option, including any City prerequisites, and complete pricing for these services. Each service shall be accompanied by a comprehensive reporting package that will allow the City to monitor the Contractor's operation. The City reserves the right to negotiate reasonable service level agreements for each service.

- 22.1 Provisioning permit stock including hand tag, window sticker or otherwise with a unique preprinted identification number. The City shall design and approve the stock design.
- 22.2 Printing and mailing of renewal and cancellation notices.
- 22.3 Processing, fulfillment and mailing (or emailing) of online permit applications. Exceptions to be forwarded to the City for handling via the PMS online platform. Fulfillment should occur within 2 business dates of application receipt.
- 22.4 Processing, fulfillment and mailing of mail in permit applications and payments, including lockbox services. Exceptions to be forwarded to the City for handling, which may include use of the online platform. Fulfillment should occur within 2 business dates of application receipt.
- 22.5 Providing a DMV interface to perform DMV look ups for the PMS, to allow for automated confirmation of registered owner name and address associated with the vehicle registration.
- 22.6 First line call center to respond to motorist questions or concerns regarding permits. Exceptions to be forwarded to the City for handling via the PMS online platform. Call center shall be available Monday through Friday between the hours of 8am and 5pm, excluding City holidays.

23. Other Services (Optional)

The Contract should consider the following requirements and address them in their proposal as desired:

- 23.1 With the implementation of new parking technology public awareness and education is important to any successful parking management program. The Contractor shall describe any public outreach/education campaign support that will be included with your solution at no additional cost to the City. The Contractor shall provide examples of prior successful implementations, including sample images, emphasizing similar installations and education introducing a new system.
- 23.2 The City is interested in innovation and value-added services. Contractors should describe any enhanced services and features that are available to the City currently or in the near future and how these services and features would be integrated to ensure motorist convenience. All associated pricing for any proposed or suggested feature must be identified.

Data, Security and System Requirements

Scope of Work

Author:

Dixon Resources Unlimited

Updated:

9/5/24

ATTACHMENT 5

1 Overview.....3

2 System and Security Requirements3

3 PCI Compliance.....4

4 Data Requirements.....4

5 Integration Requirements.....5

6 Standard Integrations5

7 Integration with City Systems7

ATTACHMENT 5

1 Overview

A comprehensive Parking Management Program requires a significant focus on data, integration, and system design and security. The City desires to partner with Contractors who focus on flexible and industry leading solutions while providing secure and compliant technology. This section includes additional requirements beyond what is defined in specific sections of this RFP. Proposers must take care to fully understand all related requirements as all will be part of the resulting contract awarded.

2 System and Security Requirements

- 2.1 Contractor shall provide secure hosting and support for all functions, ensuring availability through the Internet for all devices, including desktop and mobile computers, phones, tablets, and other wireless devices. The City shall not be required to install or maintain software on servers owned or managed by the City.
- 2.2 Computers that access the System shall not require special software packages or “client” software to access the System. Any computer shall be able to access the System through a standard web browser without plug-ins or other components.
- 2.3 Contractor shall be responsible for taking every precaution to ensure that all systems, files, data, equipment, communications, and facilities are reliable.
- 2.4 Contractor shall be responsible for virus detection, prevention, control, and eradication for all System servers and connected devices.
- 2.5 Contractor shall have security features that are designed to maintain the security of all information contained in the System database and maintain the confidentiality of information. Contractor’s security for the System and all connections thereto shall conform to current industry best practices.
- 2.6 Contractor is expressly forbidden from selling, leasing, distributing, publishing, or otherwise sharing any personal information collected from the City, including, but not limited to, transaction history, address, email address, phone number, and credit card information. Notwithstanding the preceding restrictions, Contractor shall be permitted to use such information to enable the services provided to City as part of this agreement. At the City’s sole discretion, the City may direct the Contractor to share data in a secure manner with City appointed parties.
- 2.7 All information security incidents shall be reported immediately to the City. Security incidents include theft, loss, damage or compromise to information systems and data, known vulnerabilities and exploits, website defacement or compromise, successful malware attacks, denial of services, and other security events as defined by the City’s Information Security Officer.
- 2.8 Contractor shall establish and maintain data storage, retention, and archive

ATTACHMENT 5

procedures to maintain System performance.

- 2.9 The System shall provide full system backup and recovery capabilities. Contractor shall be responsible for the maintenance of the database which will include back-up and recovery procedures. Contractor shall make sufficient backups to ensure that no data is lost in any circumstances.
- 2.10 System uptime is critical. The Contractor will maintain a 99.5% or greater uptime annually for the system as whole, including any subsystems critical to solution operation.
- 2.11 Uptime will be excluding scheduled maintenance. Contractor will notify City of any schedule downtime at least 7 days in advance. Scheduled maintenance shall be coordinated to have the least impact on City operations.

3 PCI Compliance

- 3.1 As required, the Contractor solution shall be compliant with Payment Card Industry Data Security Standard Level 1 latest version at the time of contract execution.
- 3.2 As the PCI Data Security Standard evolves, Contractor shall be responsible for maintaining compliance with that standard at Contractor's sole expense.
- 3.3 Contractor shall provide an Attestation of Compliance (AoC) as a declaration of compliance status with PCI DSS at the request of the City.

4 Data Requirements

- 4.1 The City shall be the exclusive owner of all data and rights to the data generated from the Systems, regardless of whether the data is direct or derived, calculated, or modeled.
- 4.2 Contractor shall store or archive (with the City's approval) all transaction data generated during the term of the Agreement and retain it for at least five years after its termination.
- 4.3 Contractor shall deliver copies of all System data upon request of City, or its designee, and upon the termination of the Agreement in a format mutually agreed upon by both parties.
- 4.4 Contractor shall be responsible for providing transaction data in a format that is readable by City using commonly available commercial off-the-shelf software.
- 4.5 At termination of the contract, for any reason, resulting from this RFP, if the successor contract is awarded to another firm, Contractor must develop and implement a Data Conversion Plan between Contractor and the City or its designee.

5 Integration Requirements

Some required integrations are fully defined in solution specific sections of this RFP. This section includes additional or complimentary requirements. It is assumed and required by the City that the Contractor's solution, which may include one or more systems and/or third-party systems, will be integrated by the time of contract execution as would be necessary to meet the requirements for their specific service.

- 5.1 Contractor shall utilize open-source API's that allows for current and future integration with third parties.
- 5.2 Contractor shall provide real-time integration with the City's current, new, and future parking technology and data management Contractors, including, but not limited to, citation issuance/enforcement handhelds, LPR, and mobile payment. These types of integrations are considered standard in the industry.
- 5.3 The City recognizes that standard integrations have a certain amount of latency between systems. However, timely data exchanges are required for efficient and accurate parking operations. Latency between any two systems shall not exceed an average of 90 seconds for every 100 consecutive transactions. The latency measurement shall be defined as the moment a data request is made or data is sent to the moment the data is delivered and is viewable to any end user.
- 5.4 Should latency be observed in excess of 90 seconds, Contractor will work with the City to measure the latency, identify the point of default, and correct the default.
- 5.5 Custom integration, being nonstandard and not identified in this RFP, may be considered in the future by the City. Contractor agrees to provide the necessary development to achieve a custom integration for a mutually agreed cost and schedule to be memorialized in amendment to the resulting contract from this RFP.
- 5.6 Batch data transfer may be considered for certain integrations, at the sole discretion of the City.
- 5.7 Contractor shall provide all necessary parking-related data in a format compatible with standard industry integrations. In the event that data formats between City Contractors do not match, the City may require either Contractor to make reasonable changes to their format at no additional cost to the City.
- 5.8 Contractor shall operate in good faith with the City and the City's designated Contractors to implement, troubleshoot and complete necessary integration as defined by the City.
- 5.9 In the event that two or more Contractors cannot agree on the methodology used for any integration, the City will select the methodology most advantageous for the City.

6 Standard Integrations

ATTACHMENT 5

The following is a list of standard integrations.

- 6.1 Parking Meter or Pay Station Systems shall integrate with:
 - 6.1.1 Citation Issuance, Processing and Enforcement System
 - 6.1.2 Licenses Plate Recognition System (LPR)
 - 6.1.3 Mobile or Text to Pay Payment System
- 6.2 Mobile or Text to Pay Payment System shall integrate with:
 - 6.2.1 Citation Issuance, Processing and Enforcement System
 - 6.2.2 Licenses Plate Recognition System (LPR)
 - 6.2.3 Parking Meter or Pay Station System
 - 6.2.4 Parking Access Revenue Control System
- 6.3 Parking Access Revenue Control System
 - 6.3.1 Citation Issuance, Processing and Enforcement System
 - 6.3.2 Licenses Plate Recognition System (LPR)
 - 6.3.3 Parking Meter or Pay Station System
 - 6.3.4 Mobile or Text to Pay Payment System
 - 6.3.5 Permit Management System
- 6.4 Citation Issuance, Processing and Enforcement Systems shall integrate with:
 - 6.4.1 Parking Meter or Pay Station System
 - 6.4.2 Parking Access Revenue Control System
 - 6.4.3 Licenses Plate Recognition System
 - 6.4.4 Mobile or Text to Pay Payment System
 - 6.4.5 Permit Management System
 - 6.4.6 Department of Motor Vehicles for the City's state
 - 6.4.7 Out of State motor vehicle registries
 - 6.4.8 Department of Justice or Police Department for the City's state (for wanted vehicle hotlists)

ATTACHMENT 5

- 6.4.9 California Franchise Tax Board (CA only)
- 6.4.10 Delinquent collections agency (if applicable)
- 6.5 Permit Management Systems shall integrate with:
 - 6.5.1 Parking Access Revenue Control System
 - 6.5.2 Citation Issuance, Processing and Enforcement System
 - 6.5.3 Licenses Plate Recognition System
 - 6.5.4 Any local databases necessary for permit processing
- 6.6 Licenses Plate Recognition System shall integrate with:
 - 6.6.1 Citation Issuance, Processing and Enforcement System
 - 6.6.2 Parking Meter or Pay Station System
 - 6.6.3 Parking Access Revenue Control System
 - 6.6.4 Mobile or Text to Pay Payment System
 - 6.6.5 Permit Management System
 - 6.6.6 Department of Justice or Police Depart for the City's state (for wanted vehicle hotlists)

7 Integration with City Systems

1. TBD
2. Integration with City systems shall be considered a standard integration.