



VILLAGE OF DOBBS FERRY BOARD OF TRUSTEES
WORKSHOP AGENDA

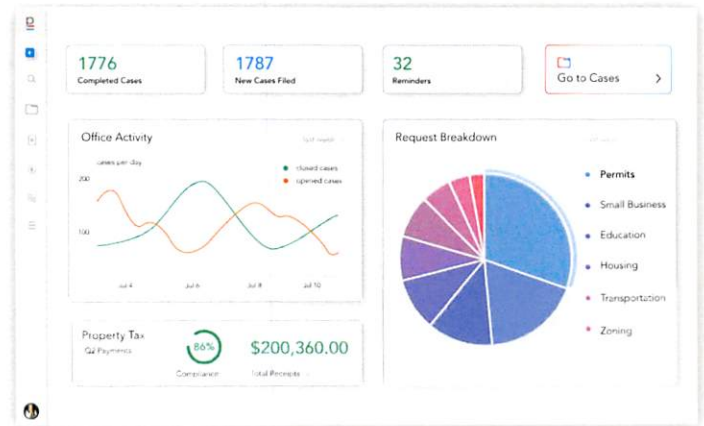
MEETING DATE: SEPTEMBER 27, 2022
AGENDA ITEM SECTION: PRESENTATIONS
AGENDA ITEM NO. :
AGENDA ITEM: POLIMORPHIC SOFTWARE
ITEM BACKUP DOCUMENTATION: 1. POLIMORPHIC FLYER 2. POLIMORPHIC EXECUTIVE SUMMARY BRIEF

The Polimorphic Solution:

Constituent Relationship Management (CRM)

Our core product is an intelligent communications CRM with workflow management and constituent engagement features designed specifically for municipalities.

Polimorphic saves staff time and improves outcomes while increasing transparency and building trust.



✓ Increase Capacity

By cutting down on time spent per request, Polimorphic enables government offices to handle a higher volume of constituent and business inquiries

✓ Enhanced Community Engagement

Fully integrated messaging capabilities for broad or targeted communications

✓ Engagement & Performance Analytics

Automated visualization of service volume and performance data, including what, when, and where

✓ Panoramic Constituent Understanding

Through automatic integration, Polimorphic captures and structures information to provide communities with a holistic understanding of their constituents' needs

✓ Process Management & Transparency

Document and track processes for staff to implement and constituents to track

✓ Integrated Online Payments

Secure payments for all fees and taxes, including automated follow up on upcoming, late, and missing payments

Benefits to Your Community

1

Accountability

Internal and external

2

Transparency & Trust

Between you and your constituents and across departments

3

Efficiency

In processes, communications, and financial management

Megan Sherlund, Zoning Administrator
in **Town of St. Albans, VT** says:

"Polimorphic has elevated the Town of St. Albans to a higher level of transparency and communication with applicants and other residents throughout the Town in regards to status of zoning permits."

Customer Successes:

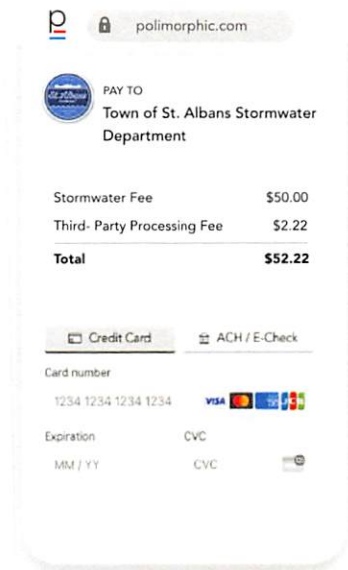
Town of St. Albans, Vermont

Zoning Permits, Stormwater Payments, and Constituent Relationship Management

Town of St. Albans runs everything from permits and licensing to stormwater fee collection on Polimorphic. Additionally, Town of St. Albans has created public-facing, online processes to increase transparency with constituents and efficiency among staff.



250% increase in digital payments from 2020 to 2021



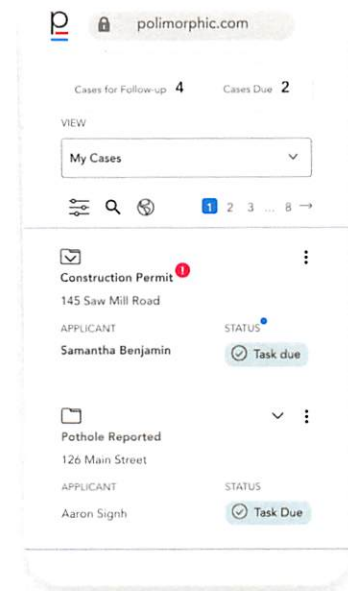
Wiggins, Colorado

Bulk Water Meter Payments, Licensing and Permitting Processes, and Constituent Relationship Management

Wiggins replaced its paper and pen system for tracking bulk water meter payments by adopting Polimorphic, which is integrated into their ERP. Polimorphic enables constituents to apply online for licenses and permits and guides them through the processes. Staff can then easily track open cases and tasks for follow up.



100% of bulk water meter payments running with Polimorphic



Security

Polimorphic is built from the ground up with security in mind.



Cloud infrastructure housed in the USA on Amazon Web Services GovCloud (same physical servers as the DOJ, DoD, and NASA).



All data encrypted in transit and at rest so that no one except you can access your data.



PCI Level 1 and NACHA compliant instant payments powered by Mastercard, and Stripe, the largest digital payments service in the world.



Constituent Relationship Management

Benefits to Your Community

1. **Accountability**
Internal and external
2. **Transparency & Trust**
Between you and your constituents and across departments
3. **Efficiency**
In processes, communications, and financial management



Improved experience for the public, businesses, and those who serve them...

- + Focus on the most important tasks by automating process & workflows
- + Gain a holistic understanding of your constituency — who they are, what they need, and how best to serve them
- + Adopt a data-driven approach to leading, serving, and building your community's future
- + Getting more done, faster and efficiently, with less staff level of effort
- + Improve the constituent experience — adopting fully integrated constituent services technology

Comprehensive Constituent Profiles & Engagement

Efficient, Accountable, & Transparent

- ✓ Fully integrated communications with the public
 - Via email, text, written, and voice
- ✓ Transparent process for the public; structured process for employees
- ✓ Internal accountability to ensure timeliness and a customer-focused approach
- ✓ Complete integration of constituent data, allowing an immersive understanding of your community



Search Contacts

A

 Abe Franklin

AB abraham@lincoln.com

B

 Benjamin Franklin

BE berg@ice.com

 Betsy Ross

D

 Derrick Franklin

BE detroit@ice.com

 Doris Ross

F

 Franklin Franklin

BE fred@fred.com



Ben Franklin

ben@polimorphic.com

Edit Contact



Phone: 949-375-2015

Backup Email: benfranklin@polimorphic.com

Address: 2660 Hilton Rd, Ferndale MI 48220

Tags:



Education



Housing and Urban Development



Education



Teacher

All Communications



Email



Phone Calls



Files

New Business Permit

In Progress

Today 8:31am

Awesome! Should be around 2 to 3 weeks. I just forwarded this to the Zoning board. I need a couple final pieces of information. Could you sign the linked form.

I need a couple final pieces of information. Could you sign the linked form.

Update Address on Permit

Yesterday 8:21am

Awesome! Should be around 2 to 3 weeks to see those changes reflected.

I've gone ahead and updated your address in our files.

Notes

Jul 24th, 2020

Really interested in education policy. Currently teaching at University of Detroit, Mercy. [\(show more\)](#)

Jun 4th, 2020

Be sure to speak loudly when calling. Is hard of hearing.

Jun 4th, 2020

Be sure to speak loudly when in person. Is hard of hearing.

Constituent Profile

COVID Small Business Clarification

View constituent-specific information

The screenshot displays a software interface with a top navigation bar containing icons for mail, phone, and people, along with the text "Open 5". A left sidebar features a vertical menu with icons for a plus sign, search, mail, calendar, and a list icon. The main content area shows a list of items, with the first item, "New Business Permit", selected. This item's details are shown in a right-hand pane, including a message from "Ben" and a list of assignees: Ben Franklin (Permitting), George Washington (Public Works), Ben Franklin (Energy), Abigail Adams (Permitting), and Poli Revere (General). A right sidebar contains two sections: "Members", listing Paul Revere and Benjamin Franklin with contact information for Benjamin Franklin, and "Attachments", listing "Public Service Loan Application", "Additional Information Request", and "Privacy Act Release Form".

New Business Permit

Today **Ben** - Great! Here's the new business proposal with information on the entity and the location...

Assign Clear Remind Me

Mark as: Casework Correspondence Internal Other

- ✓ Pothole on Delaware Road, Had to Use River Instead
- ✓ Municipal Electricity Issue
- ✓ Permit Request for Construction on 1600 Pennsylvania Avenue
- ✓ Noise Complaint

Members

- ✓ Paul Revere
- ✓ Benjamin Franklin

Phone: 949-375-2015
Email: ben@polimorphic.com
Address: 320 High Street, Palo Alto CA 94301

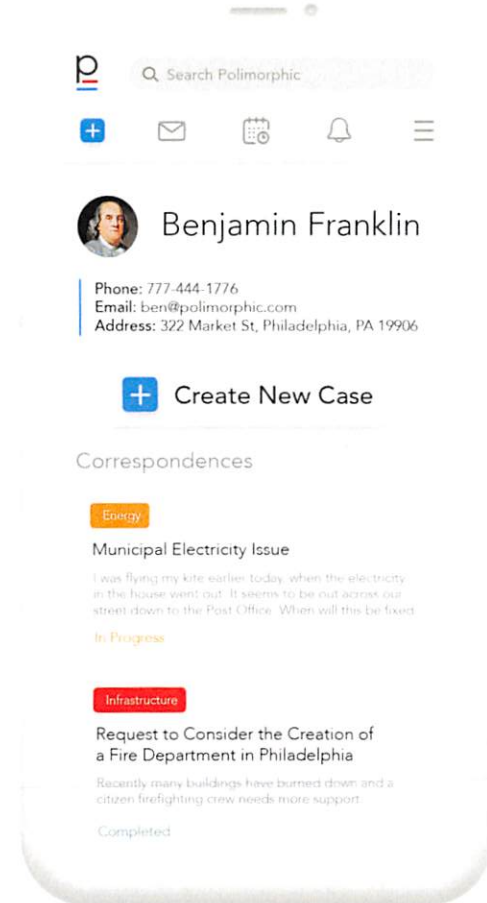
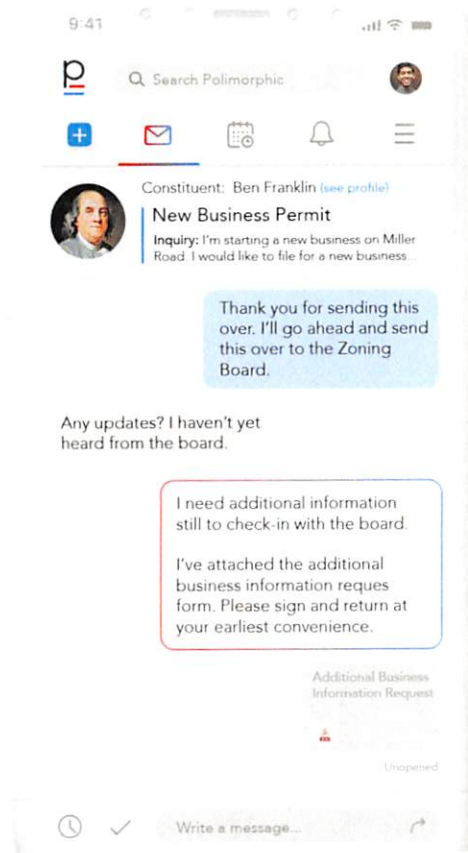
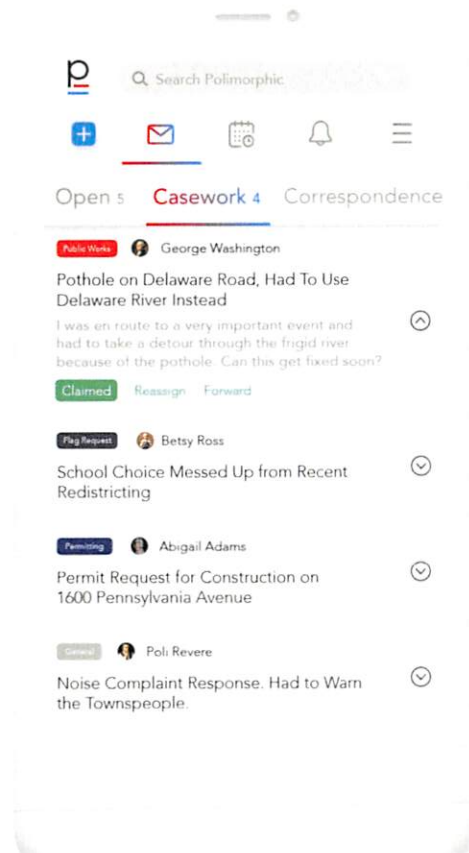
[+ Add Participant](#)

Attachments

- Public Service Loan Application
- Additional Information Request
- Privacy Act Release Form

Inbox View

See open communications and team activity

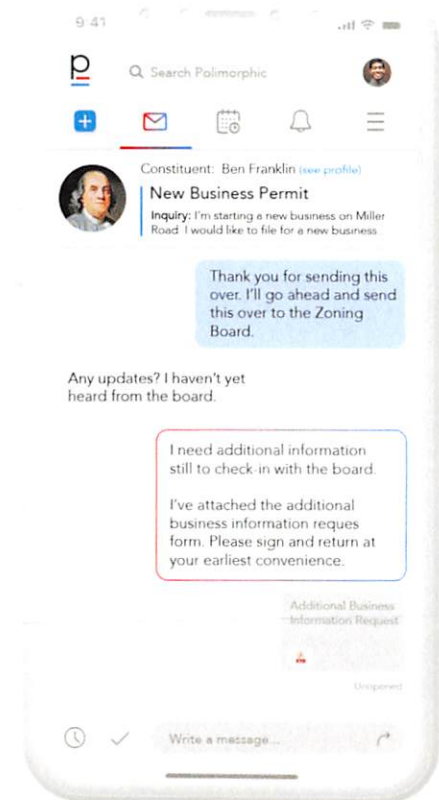
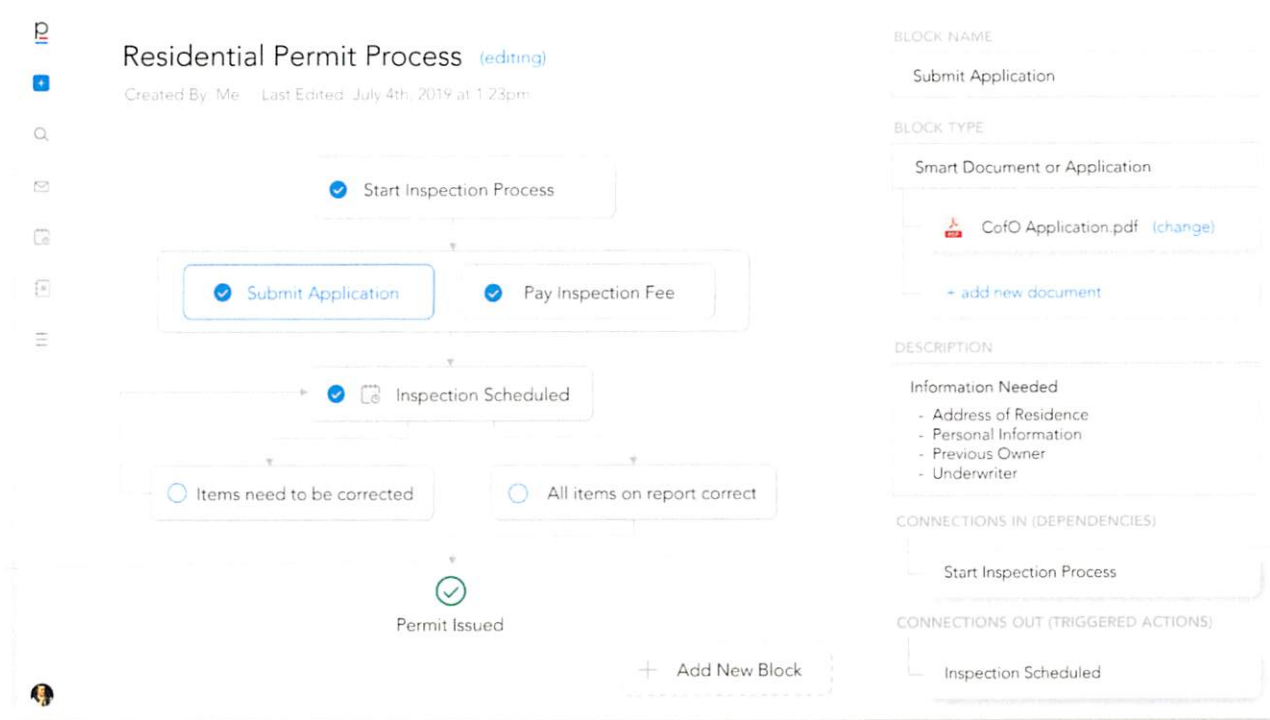


Mobile Friendly

Polimorphic is cross-browser compatible and mobile friendly

Process Management

Efficient, Accountable, & Transparent



Payments and Financial Management Integration

Seamless, Reliable, Secure

- ✓ Seamless, reliable, and secure constituent payment experience
- ✓ Transparent fee and billing visibility and status
- ✓ Integrations with financial management software
- ✓ One-click checkout and unified log in experience for constituents



Parcel: 12345678910
Emmalee Cherington
123 Deer Rd
St Albans Town, VT 05458

Stormwater Fee	\$100.00
Stormwater Credit	-\$50.00
Property Tax (Town)	\$1150.00
Property Tax (State)	\$1240.00
Service Fee	\$25.00
<hr/>	
Total	\$2465.00

Credit Card

ACH / E-Check

Email

Full name

First and last name

Bank account








Search for your bank



[Enter bank details manually instead](#) (takes 1-2 business days)


PCI Level 1 Compliance and NACHA Compliance

State of the art security, only municipal payments vendor with instant bank verification


Search Contacts

A


 Abe Franklin

AB abraham@lincoln.com


B

 Benjamin Franklin


BE berg@ice.com

 Betsy Ross


D

 Derrick Franklin


BE detroit@ice.com


 Doris Ross

F






 Franklin Franklin

fred@fred.com

 Frita Ross






Ben Franklin
ben@polimorphic.com





 Edit Contact    

Phone: 949-375-2015
Backup Email: benfranklin@polimorphic.com
Address: 320 High Street, Palo Alto CA 94301

Tags:

 Education  Housing and Urban Development

 Education Teacher + More

All Communications  Emails  Phone Calls  Files Payments 

Payment ID	Payment Date	Cost Object	Status	Amount
C9467843	6/18/2021	Stormwater Fee (Parcel Id: 12345678910)	Completed	\$50.00
AB45C66	6/15/2020	Property Tax - Local (Parcel Id: 12345678910)	Requested	\$1150.00
XY32ZZ1	5/12/2020	Property Tax - State (Parcel Id: 12345678910)	Pending	\$1240.00
				\$ 2440.00

Notes

Add New Note

No notes

Payments Integrated into constituent records

Receive a global view of every constituent payment



Payment Collections

All payments collected and logged by Polimorphic

Q Name, Address, Amount...

Collect a Payment

Create Report



TOTAL RECEIPTS

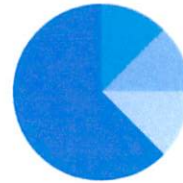
\$100,010

PAYMENTS LOGGED

60

TIME PERIOD

12/1/22 - 6/13/22



PAYMENT METHOD

CHECK \$700.00
CASH \$20.00
CREDIT CARD \$500,000.00
ACH / E-CHECK \$100,000.00



PAYMENT DESCRIPTION

Property Tax
Water Bill
Fees
Other
Fines

Payment Types

Transactions

1 2 3 ... 8 →

DESCRIPTION	PROCESS	# PAYMENTS RECIEVED	TOTAL RECEIPTS	# OVERDUE	AMOUNT OVERDUE
Property Tax	Property Tax	100	\$25,000.00	100	\$25,000
Dog License Fee	Dog License	10	\$350.00	0	\$0
Application Fee	Zoning Permit	10	\$350.00	1	\$35.00
Recording Fee	Zoning Permit	10	\$350.00	0	\$35.00
Water Bill	Water Bill	200	\$20,0000	100	\$2,000

Dashboard and Analytics

Clear statistics and viewing of breakdowns off different payment types

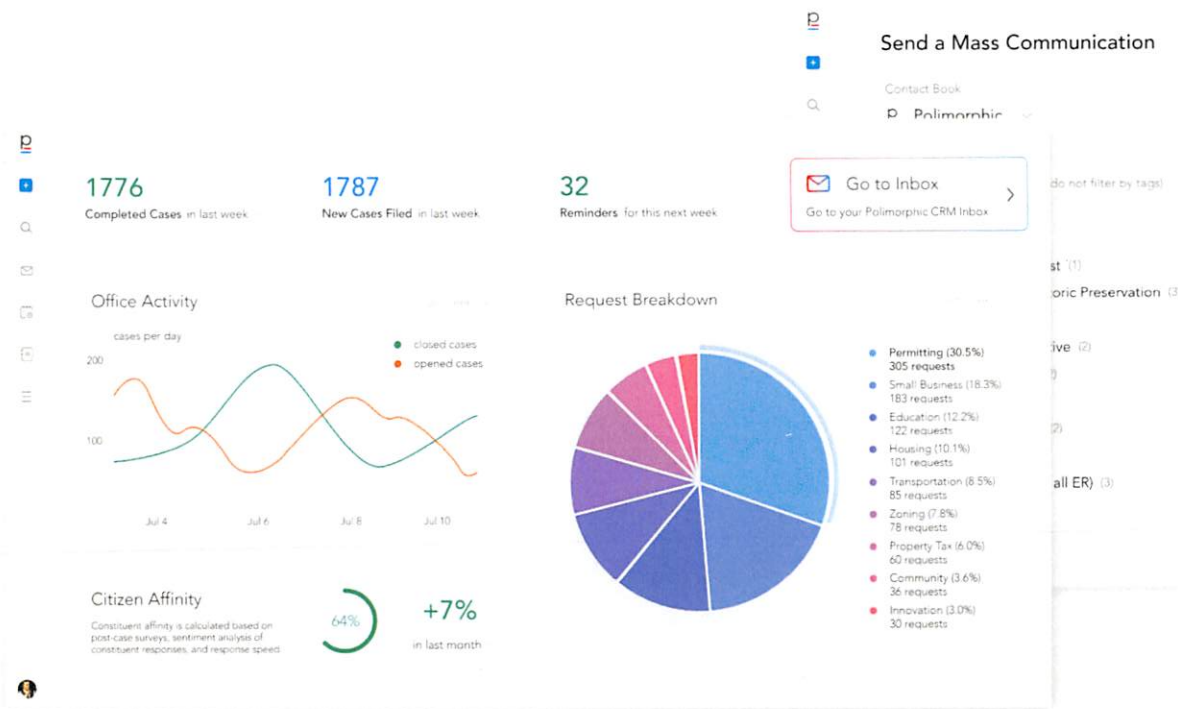
Workforce & Service Management

Data-Driven, Embedded, Proactive

- ✓ Fully integrated, multi-view (satellite, 3D, street view) geolocation capable
- ✓ Targeted and mass communication capabilities
- ✓ Data-driven approach to financial management and budgeting
- ✓ Real-time dashboard for holistic view of city services and constituent issues

Workforce & Service Management

Data-Driven, Embedded, Proactive



Efficiency | Trust | Transparency

Polimorphic empowers community leaders to shape their future

Significant aspects of life are evolving - how we travel, when and where we work, and what technologies we use to manage our lives and businesses.

Communities must evolve to support a more engaged, digitally-capable, and *digitally-expectant* society.

To plan for the future, community leaders need to accurately and comprehensively understand who they serve and how - and do it in an efficient, timely, and transparent manner.