

hoConcourse Tech Inc.

# Risk Management Information Software & Claims Management

RFP NO. 20260367

**Charlotte County, Florida**

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April 17, 2026

Dear Evaluation Committee,

We are pleased to submit this proposal on behalf of Concourse Tech Inc. Thank you for the opportunity to be considered by Charlotte County, Florida.

Charlotte County's need to move from sole reliance on a TPA system to a unified, County-owned RMIS, while simultaneously deploying a full Environmental Health and Safety module at go-live, represents a significant operational transformation for your Risk Management Division. Concourse understands that this is not simply a software purchase; it is about giving your 20-person RMD team direct control over claims data across six coverage lines, enabling field personnel to report incidents offline from county-issued devices, and maintaining real-time synchronization with Commercial Risk Management.

Concourse's platform is cloud-native, API-first, and purpose-built for the public sector, with prebuilt integration capabilities for systems like Laserfiche, CityWorks, OnBase, and SharePoint that Charlotte County already relies on. Our implementation approach delivers weekly clickable prototypes so your team, including your TPA representatives at CRM, can validate workflows and data flows iteratively rather than waiting until the end of a lengthy build cycle.

Our recent delivery of a statewide management platform for the State of Oklahoma, serving 600+ agencies with configurable hierarchies and reporting, directly informs how we will structure Charlotte County's five-level financial hierarchy and property SOV hierarchy. We are confident Concourse can deliver a system that meets your requirements on time and within budget.

Sincerely,

A handwritten signature in black ink that reads "Thomas Smyth". The signature is written in a cursive style with a long, sweeping underline.

**Thomas Smyth**

Chief Executive Officer, Concourse Tech Inc.

## Executive Summary

Concourse Tech Inc. is pleased to submit this proposal in response to Charlotte County's RFP No. 20260367 for a Risk Management Information Software system with integrated Claims Management and Environmental Health & Safety capabilities. We understand that Charlotte County's Risk Management Division administers insurance and risk management programs across the Board of County Commissioners, Clerk of the Circuit Court, Supervisor of Elections, Tax Collector, and Property Appraiser, covering approximately 2,000 employees and managing over 800 claims annually across Workers Compensation, General Liability, Auto, Property, Firefighter Cancer, Subrogation, and Disaster Event lines.

Concourse's platform provides a vendor-hosted, cloud-native RMIS solution with full claims lifecycle management, a comprehensive EHS module, offline-capable mobile incident reporting, and real-time bi-directional integration with Charlotte County's Third-Party Administrator, Commercial Risk Management (CRM). The platform supports configurable hierarchies, ad hoc reporting, role-based dashboards, paperless claims processing, litigation tracking, and named storm event management, all critical capabilities for a Gulf Coast county managing complex, multi-line risk programs.

Our proposal delivers an all-inclusive annual subscription of \$75,000 per year with no one-time implementation fees, no per-user surcharges, and no hidden costs. This flat annual investment covers the complete RMIS and EHS platform, implementation and configuration, migration of 25 years of historical claims data (~13,000 claims), all system integrations, training, and ongoing support with regular product upgrades. Concourse will deliver the fully operational system within 18 weeks of contract execution, followed by a 30-day hypercare period.

### Key Highlights

- **Annual Investment** \$75,000/year all-inclusive, no implementation fees
- **Implementation** 18-week delivery with 30-day hypercare support
- **Coverage** All 6 claim lines plus full EHS module live at go-live
- **Data Migration** 25 years of historical claims (~13,000 claims) fully migrated and validated
- **Licensing** 10 full users + unlimited light/view-only users included

# Understanding of Requirements

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## Charlotte County's Current State and Transformation Goals

Charlotte County's Risk Management Division currently operates without a standalone RMIS, relying solely on access to the TPA system at Commercial Risk Management (CRM) for reviewing notes and basic financial information on claims. This means the County's risk data lives outside of County-controlled infrastructure, limiting the RMD's ability to run ad hoc reports, build custom hierarchies aligned with the County's financial structure, manage the full claims lifecycle internally, and maintain a centralized repository of insurance policies and risk management documents.

We recognize that this RFP represents more than a technology procurement. It is a fundamental shift in how Charlotte County manages institutional risk knowledge. The County is moving from a model where the TPA holds the system of record to one where Charlotte County owns and controls its risk data while maintaining tight, real-time integration with CRM for claims administration.

## The Real-World Challenges Behind the Requirements

Having supported similar transitions for public sector organizations, we understand the challenges that extend beyond the stated technical specifications:

- **TPA Coordination Complexity** Establishing real-time bi-directional data exchange with CRM requires close collaboration with a third party who has their own technical constraints, timelines, and priorities. This is often the longest-lead integration in an RMIS deployment.
- **Data Migration Integrity** Migrating 25 years of claims data (~13,000 claims across 6,917 lines) is not just a technical exercise. It requires validating data completeness, reconciling financial totals, mapping legacy codes to new hierarchies, and ensuring no claims are lost or misattributed during conversion.
- **Change Management Across Agencies** The RMD serves five distinct constitutional offices (BCC, Clerk, Supervisor of Elections, Tax Collector, Property Appraiser), each with different workflows and expectations. Gaining adoption across these stakeholders requires early engagement and visible, iterative progress.
- **Offline Mobile Reliability** Field personnel need to report incidents from county-issued devices in environments where connectivity may be intermittent (construction sites, remote facilities, disaster scenes). Offline capture must be reliable and intuitive; a failed sync can mean a lost or delayed claim.
- **Named Storm Event Preparedness** As a Gulf Coast county that has experienced significant hurricane impacts, Charlotte County needs a system that can rapidly scale to manage high-volume disaster claims, track Extra Expense, Non-Scheduled Property in the Open (NPITO), deductibles by asset, and totals by named storm, all under time pressure and public scrutiny.
- **EHS Module Adoption** Deploying a full EHS module simultaneously with the RMIS, covering event intake, investigations, audits, JSA, LOTO, training tracking, chemical management, and environmental compliance, requires careful coordination with the People Operations team and Environmental Health/Safety stakeholders to avoid overwhelming users at go-live.

## Scope Alignment

Our understanding of Charlotte County's requirements encompasses the following core areas:

- A unified, vendor-hosted RMIS managing all six coverage lines (Workers Compensation, General Liability, Automobile, Property, Firefighter Cancer, Subrogation) plus Disaster Event claims on a single platform
- A fully integrated EHS module deployed at go-live, covering all nine sub-capabilities identified in the RFP (Event Intake, Investigations & CAPA, Audits & Inspections, JSA, LOTO & Permit

to Work, Training & Certifications, Chemical Management & SDS, Environmental Compliance, Document Control & Analytics)

- Real-time bi-directional integration with CRM (TPA), with claims filed in the RMIS automatically feeding into CRM's system and financial/notes updates flowing back at an agreed frequency
- Offline-capable mobile incident reporting from county-issued cell phones and tablets, operational at go-live
- Complete data migration of approximately 25 years of historical claims data from the CRM TPA system
- Five-level financial hierarchy aligned with the County's accounting structure, plus a Property hierarchy housing the Statement of Value (SOV) from the insurance carrier
- Integration with Laserfiche, CityWorks, Smartsheet, GIS, OnBase, MS SharePoint, Legal Files, and the County's excess carrier system
- HIPAA-compliant data handling, EDI standards compliance (HCPCS, CPT, CDT), and robust disaster backup and recovery
- Role-based access control supporting 20 full RMD users and an unlimited number of light/view-only users
- Named storm event management with tracking for Extra Expense, NPITO, Deductible by Asset, and Total by Named Storm

## Proposed Solution

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Concourse proposes a comprehensive, cloud-native RMIS platform configured specifically for Charlotte County's risk management and claims administration needs. The solution is vendor-hosted, eliminating the need for County IT infrastructure, and includes all modules, integrations, data migration, training, and ongoing support within a single annual subscription.

### Claims Management Platform

The Concourse RMIS platform provides end-to-end claims lifecycle management across all of Charlotte County's coverage lines. The platform supports incident intake through closure, with configurable workflows that guide RMD staff through best-practice data collection at each stage.

<p><b>Workers Compensation</b></p> <p>Full First Report of Injury through settlement lifecycle. Automated reserves, scheduled indemnity payments with ending date prompts, claimant demographics, injury/illness coding (cause, nature, body part), employment data (wage, benefit, occupation, work status), and return-to-work tracking.</p>	<p><b>General &amp; Auto Liability</b></p> <p>Insured and claimant demographic capture, vehicle and driver data, damage descriptions and estimates, passenger information, accident details, safety compliance, agency report submissions, and third-party investigation assignment tracking.</p>	<p><b>Property Claims</b></p> <p>Location-based property loss recording with damage descriptions, estimates, owner demographics, and linkage to the Property/SOV hierarchy for insurance carrier coordination.</p>
<p><b>Firefighter Cancer &amp; Subrogation</b></p> <p>Specialized claim types with configurable fields, financial tracking, and documentation management tailored to Florida statutory requirements.</p>	<p><b>Disaster Event / Named Storm</b></p> <p>Storm event management with ancillary claims tracking for Extra Expense, NPITO, Deductible by Asset, and Total by Named Storm. Rapid mass-intake capabilities for high-volume disaster scenarios.</p>	<p><b>Litigation Tracking</b></p> <p>Applicant and defense attorney tracking, filings, depositions, mediations, hearing outcomes, and settlement documentation with demands, evaluations, authorizations, and agreements across primary and excess insurers.</p>

## Financial Management

The platform provides comprehensive financial transaction management including the ability to set and edit reserves, record receipt and payment or denial of bills, manage subrogation and recovery transactions, and track settlements with full documentation. Automated reserve calculations and scheduled indemnity payments with configurable prompts reduce manual effort and improve accuracy.

## Document & Correspondence Management

The platform supports a fully paperless claims environment with robust document management capabilities:

- Store and index attachments including PDF, PDF (text searchable), .tif, .jpg, .png, .heic, and all popular MS Office file formats
- Scanning and uploading of supporting documentation directly into incident and claim files
- Free-form notepad with diary and email functionality for claim-level communication
- Merge fields interfacing with user-definable templates for automated claim management correspondence and forms
- Email integration for sending and receiving updates directly within the system

## Reporting & Analytics

Concourse's platform includes a powerful reporting engine designed to support Charlotte County's multi-level organizational structure:

- **Financial Hierarchy** Five-level hierarchy aligned with Charlotte County's financial accounting system, enabling reports to be run and pivoted at each level by coverage line, business unit, frequency, and severity.
- **Property Hierarchy** SOV-based hierarchy housing Location number, Name, Address, Property Value, and Personal Property (Contents) Valuation, with Excel import capability from the insurance carrier.
- **Ad Hoc Reporting** Drag-and-drop report builder available to RMD staff and authorized light users, enabling custom reports without IT involvement.
- **Role-Based Dashboards** Configurable KPI dashboards displaying claim counts, reserve totals, open/closed ratios, trending data, and other key metrics tailored to each user's role.
- **Data Extract & Export** CSV and Excel export capabilities for all reports and data sets, supporting Charlotte County's analytical workflows.

## Environmental Health & Safety (EHS) Module

The EHS module is fully integrated with the RMIS platform and will be implemented at go-live, as confirmed in Addendum #1. The module provides a secure, web- and mobile-enabled environment that centralizes safety, environmental, and health workflows while connecting directly with the claims management system for County-wide visibility and risk reduction.

<p><b>Event Intake</b></p> <p>Employee portal with optional anonymous reporting, offline mobile capture, and automated notifications and tasking for rapid response to safety events.</p>	<p><b>Investigations &amp; CAPA</b></p> <p>Structured investigation workflows with root cause analysis, corrective and preventive action tracking through closure, and linkage to related claims.</p>	<p><b>Audits &amp; Inspections</b></p> <p>Configurable checklists, scheduling, findings documentation, follow-up tracking, and trend analysis across facilities and departments.</p>
<p><b>Job Safety Analysis (JSA)</b></p> <p>Hazard identification, control measures, approval workflows, and version control for safety procedures.</p>	<p><b>LOTO &amp; Permit to Work</b></p> <p>Lockout/tagout procedures, permitting workflows, approval chains, and comprehensive records management.</p>	<p><b>Training &amp; Certifications</b></p> <p>Tracking of trainings, meetings, and certifications with automated reminders, expiration alerts, and compliance dashboards.</p>
<p><b>Chemical Management &amp; SDS</b></p> <p>Chemical request and approval workflows, Safety Data Sheet management, chemical profiles, and inventory transaction tracking.</p>	<p><b>Environmental Compliance</b></p> <p>Compliance calendar with tasking, permit tracking, environmental assessments, and regulatory content integration.</p>	<p><b>Document Control &amp; Analytics</b></p> <p>Centralized document storage with version control, role-based EHS dashboards and KPIs, and ad hoc reporting capabilities.</p>

## Offline Mobile Capability

As confirmed required at go-live in Addendum #1, Concourse's platform includes a mobile application for iOS and Android that enables Charlotte County field personnel to report incidents from county-issued cell phones and tablets, even in areas with limited or no connectivity. Key mobile capabilities include:

- Offline incident capture with automatic synchronization when connectivity is restored
- Photo and document attachment from mobile devices (supports .jpg, .png, .heic, and camera capture)
- Pre-filled fields using uploaded vehicle, employee, and location data for accurate, efficient reporting
- Push notifications for assigned tasks, workflow updates, and diary reminders
- Secure authentication with role-based access consistent with the web platform

## Technical Approach

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### Platform Architecture

Concourse's RMIS platform is a cloud-native, vendor-hosted SaaS solution deployed on secure infrastructure with enterprise-grade reliability. The architecture is designed for flexibility, scalability, and long-term maintainability.

- **Hosting** Vendor-hosted cloud environment with no County IT infrastructure required. Charlotte County accesses the system entirely through a web browser and mobile application.
- **Security** Role-based access control (RBAC) with configurable permission levels for full users and light/view-only users. Encrypted data at rest and in transit. HIPAA-compliant data handling and privacy controls.
- **Configurability** Workflows, notifications, data fields, and business rules are configurable by authorized administrators without custom code, allowing Charlotte County to adapt the system as statutory requirements or business processes change.
- **API-First Design** RESTful APIs enable integration with Charlotte County's existing systems and future technology investments. Standard CSV/Excel import and export capabilities support bulk data operations.
- **Disaster Recovery** Automated backups, geographically redundant storage, and documented recovery procedures aligned with Charlotte County's backup and recovery expectations.

## TPA Integration with Commercial Risk Management (CRM)

The integration between Concourse's RMIS and Charlotte County's TPA, Commercial Risk Management, is the most critical technical component of this implementation. As confirmed in Addendum #1, claims filed in the RMIS must automatically feed into CRM's system in near real-time, particularly for Workers Compensation claims.

## TPA Integration Method

- Concourse will implement a bi-directional integration with CRM using available API methods and/or secure file-based exchange, based on the integration capabilities CRM provides. Our approach includes:
- RMIS to CRM (Outbound) When an incident is converted to a claim in the RMIS, the system will transmit claim information to CRM's system in near real-time (based on API capabilities) or via scheduled automated file export at a frequency agreeable to all parties.
- CRM to RMIS (Inbound) Financial data, notes, and status updates from CRM will be imported into the RMIS through an automated export file at a frequency agreeable to Charlotte County. This ensures the RMIS serves as a comprehensive, current system of record.
- Discovery & Coordination During Phase 1, Concourse will engage directly with CRM representatives (available at 800-237-6617) to map integration endpoints, define data formats, establish synchronization frequency, and document the agreed-upon method.

## Third-Party System Integrations

Concourse's platform can integrate with Charlotte County's existing systems based on available integration methods (APIs, CSV/Excel exchange, file shares, or other connectors). During discovery, we will assess each system's integration capabilities and implement the most reliable approach.

COUNTY SYSTEM	INTEGRATION APPROACH	SCOPE
Laserfiche	API or file-based connector	Document exchange and indexing for claims attachments
CityWorks	API or CSV exchange	Asset and work order data for property and incident correlation

Smartsheet	API connector	Data synchronization for project tracking and reporting
GIS	API or map service integration	Location-based incident mapping and property hierarchy support
OnBase	API or file-based connector	Document management interoperability for claims files
MS SharePoint	API connector	Document sharing and collaboration across departments
Legal Files	API or CSV exchange	Litigation tracking data synchronization
Excess Carrier Systems	API or secure file exchange	Claims and financial data reporting to excess insurers

Additionally, the system can accept Excel-based data uploads from vehicles, employees, and other sources to enable prefill capabilities on incident entry by RMD staff, as specified in the RFP.

## Data Migration Strategy

Migrating 25 years of historical claims data (approximately 13,000 total claims across 6,917 lines of data) is a high-stakes operation that Concourse takes seriously. Our data migration approach follows a structured, validated process:

- **Data Extraction:** Work with CRM to obtain complete loss run data in a structured format (CSV/Excel), covering all coverage lines and business units
- **Data Profiling & Cleansing:** Analyze the extracted data for completeness, consistency, and quality. Identify and resolve data anomalies before import
- **Hierarchy Mapping:** Map existing data to Charlotte County's five-level financial hierarchy and property hierarchy, ensuring every claim is correctly attributed
- **Staged Migration:** Import data in controlled batches with validation checkpoints after each stage

- **Reconciliation:** Conduct a full financial reconciliation comparing source data totals to migrated data totals by coverage line, business unit, and year. Charlotte County RMD staff will participate in validation
- **Sign-Off:** Formal data migration acceptance by the County before proceeding to UAT

## Compliance & Standards

- **HIPAA** The platform implements appropriate privacy and security controls for protected health information, including encrypted storage, access controls, and audit logging.
- **Florida Public Records** Concourse will comply with Chapter 119, Florida Statutes, maintaining public records as required and providing access upon request.
- **EDI Standards** The system follows national electronic data interchange standards and supports standard medical codes including HCPCS, CPT, and CDT.
- **E-Verify** Concourse is registered with and uses the E-Verify system per Section 448.095, Florida Statutes.

## Implementation Timeline & Milestones

Concourse proposes an 18-week implementation timeline with a 30-day hypercare period following go-live. This timeline accounts for the full scope of requirements, including the EHS module, TPA integration, data migration, offline mobile capability, and all third-party integrations. The timeline assumes a contract start within 30 days of Board of County Commissioners approval.

PHASE	WEEKS	KEY DELIVERABLES
Phase 1: Discovery & Planning	1-3	Kickoff with RMD, IT, EHS, and CRM (TPA) representatives; requirements validation; data migration assessment; integration mapping; hierarchy design; project plan with RACI matrix

Phase 2: Core Configuration & Data Migration	4-9	Claims module configuration (all 6 lines); EHS module full configuration (all 9 sub-capabilities); RBAC setup; workflow and notification configuration; data extraction, cleansing, and migration; TPA integration build; third-party integration configuration; mobile app setup; report and dashboard configuration
Phase 3: Testing & Quality Assurance	10-13	System integration testing; TPA real-time feed validation; offline mobile testing; data migration reconciliation; UAT with RMD staff and light users; EHS UAT with safety stakeholders; security and HIPAA validation; disaster recovery testing
Phase 4: Training & Deployment Readiness	14-16	Administrator training; full-user training (10 RMD staff); light-user training; EHS module training; mobile app training; recorded session library; user documentation; go-live readiness checklist
Phase 5: Go-Live & Hypercare	17-18+	Production launch; real-time integration monitoring; dedicated support team; daily check-ins for first two weeks; 30-day hypercare with priority SLA; post-go-live assessment; transition to standard support

## Weekly Stakeholder Engagement

Throughout implementation, Concourse will provide weekly clickable prototypes and progress demonstrations to Charlotte County's project team. This iterative approach ensures the RMD team, IT Business Analyst, and EHS stakeholders can validate configuration decisions in real time rather than discovering issues during late-stage testing. We will also include CRM (TPA) representatives in relevant integration review sessions.

## Transition Plan for Open Claims

Concourse's transition plan includes a defined process for handling outstanding and open claims during the migration period. During Phase 2, all historical claims data (including open/active claims) will be migrated with full financial and notes history. A parallel period will be established where both

the existing CRM system and the new RMIS are accessible, ensuring no gaps in claims administration. The cutover to the new system will occur only after data reconciliation is complete and the County has formally accepted the migration.

## Implementation Risks & Mitigation

RISK	LIKELIHOOD	MITIGATION STRATEGY
TPA integration delays due to CRM scheduling or technical constraints	Medium	Engage CRM representatives in Week 1 kickoff; establish integration requirements and testing timeline jointly; allocate buffer time in Phase 2 for TPA coordination
Data migration quality issues (incomplete records, inconsistent coding across 25 years)	Medium	Structured data profiling in Phase 1; staged migration with validation checkpoints; full financial reconciliation before sign-off; dedicated data migration specialist on the project team
Stakeholder alignment across five constitutional offices with different workflows	Medium	Early stakeholder mapping in discovery; weekly demo sessions with representatives from each office; configurable role-based views to accommodate different needs without system complexity
User adoption resistance from staff accustomed to CRM-only workflow	Low-Medium	Comprehensive training program with recorded sessions; intuitive interface design; parallel system availability during transition; designated power users within each office for peer support
Offline mobile sync failures in low-connectivity field environments	Low	Dedicated mobile testing phase including simulated offline scenarios; data conflict resolution protocols; field pilot with select users before full deployment

# Support & Maintenance

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Concourse's annual subscription includes comprehensive, ongoing support and maintenance at no additional cost. This exceeds the RFP's minimum requirement of one (1) warranty year of support following system acceptance.

## Support Services Included

- **Telephone Support** Direct phone access to Concourse's support team during business hours for technical and user assistance.
- **Online Technical Support** Web-based ticketing system for issue tracking, resolution, and knowledge base access.
- **On-Site Support** Available if necessary, at no additional cost, for issues that cannot be resolved remotely.
- **Defined SLAs** Documented service level agreements covering response times by severity level, resolution targets, and escalation procedures.
- **Product Upgrades** Regular product releases and feature upgrades included in the subscription, deployed automatically with advance notice to minimize disruption.
- **Application Maintenance** Ongoing bug fixes, security patches, and performance optimizations applied proactively.

## Continuous Improvement

The platform's configurable architecture means Charlotte County can adapt workflows, fields, and reporting as needs evolve, whether driven by new statutory requirements, changes in the insurance program structure, or lessons learned from claims operations. Concourse's support team will assist with configuration changes as part of the standard support engagement.

## Pricing

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Concourse offers Charlotte County a simple, transparent pricing model: a single annual subscription that includes every component required to deliver and sustain the RMIS and EHS platform. There are no one-time implementation fees, no per-user surcharges, and no hidden costs.

## Annual Subscription Summary

COMPONENT	ANNUAL COST
RMIS Platform (WC, GL, Auto, Property, Firefighter Cancer, Subrogation, Disaster Event)	<b>\$75,000</b>
EHS Module (all 9 sub-capabilities, fully deployed at go-live)	<b>Included</b>
Named Storm Event Management Module	<b>Included</b>
20 Full-User Licenses (RMD staff)	<b>Included</b>
Unlimited Light/View-Only User Licenses	<b>Included</b>
Offline Mobile Application (iOS and Android)	<b>Included</b>
Implementation, Configuration & Project Management	<b>Included</b>
Data Migration (25 years, ~13,000 claims)	<b>Included</b>
TPA Integration (bi-directional with CRM)	<b>Included</b>
Third-Party Integrations (Laserfiche, CityWorks, Smartsheet, GIS, OnBase, SharePoint, Legal Files, Excess Carrier)	<b>Included</b>
Financial & Property Hierarchy Configuration	<b>Included</b>
Training (administrators, full users, light users, EHS staff, mobile)	<b>Included</b>
Year 1 Warranty Support (telephone, online, on-site if needed)	<b>Included</b>
Ongoing Support, Maintenance & Product Upgrades	<b>Included</b>

Ad Hoc Reporting & Analytics Engine	<b>Included</b>
HIPAA Compliance, EDI Standards, Disaster Backup & Recovery	<b>Included</b>
Total Annual Investment	<b>\$75,000</b>

### Total Cost of Ownership

PERIOD	ANNUAL COST	CUMULATIVE COST
Year 1	<b>\$75,000</b>	<b>\$75,000</b>
Year 2	<b>\$75,000</b>	<b>\$150,000</b>
Year 3	<b>\$75,000</b>	<b>\$225,000</b>
Year 4	<b>\$75,000</b>	<b>\$300,000</b>
Year 5	<b>\$75,000</b>	<b>\$375,000</b>

## Pricing Highlights

- Concourse's flat annual pricing model provides Charlotte County with complete budget predictability. There are no escalation clauses, no per-transaction fees, and no additional charges for adding light users as the County's risk management program expands.
- No Implementation Fees All setup, configuration, data migration, integrations, and training are included in the annual subscription.
- No Per-User Fees 20 full-user licenses and unlimited light/view-only licenses are included. No additional cost as the County adds view-only users.
- Flat Annual Rate \$75,000 per year with no annual escalation built into the base term.
- Payment Terms Annual subscription invoiced upon system go-live acceptance. Net 30 days per Florida Local Government Prompt Payment Act (F.S. 218.74).

## Software Demonstration

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Concourse welcomes the opportunity to provide Charlotte County with a live software demonstration of the RMIS and EHS platform. As noted in RP-20(C)(4), we understand a demonstration may be required to assist the County in evaluating the proposed system's features and capabilities before entering into negotiations.

Concourse will bear all costs associated with the demonstration and can deliver it via video conference, in-person presentation, or a combination of both, depending on the County's preference. We are prepared to work with Charlotte County to incorporate test data and desired output scenarios to ensure the demonstration is relevant and meaningful to the evaluation committee.

During the demonstration, Charlotte County's Professional Services Committee members will be able to observe:

- Incident intake and claims lifecycle workflows for Workers Compensation, General Liability, and Property claims
- Mobile application with offline capture and synchronization

- Financial hierarchy navigation and ad hoc reporting capabilities
- EHS module event intake, investigation workflows, and audit/inspection tools
- Document management and correspondence template merge functionality
- Role-based access control with full-user and light-user permission differences
- Dashboard and KPI views configured for risk management operations

## Addendum Acknowledgment

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Concourse Tech Inc. acknowledges receipt of Addendum #1, dated March 27, 2026, and has incorporated all clarifications into this proposal. Specifically, this proposal addresses:

- Offline mobile functionality is included as a required capability at go-live (Q1/A1)
- TPA integration with Commercial Risk Management (CRM) is designed for real-time claims feed with support for both API and file-based exchange methods (Q2/A2)
- Environmental Health & Safety (EHS) module is fully implemented at initial deployment, not phased (Q3/A3)

## Concourse's Approach

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**Purpose-built for the public sector. No legacy debt. No compromise.**

Concourse is a technology company built exclusively to serve government agencies, school districts, and public institutions. Our platform is cloud-native, modular, and API-first, delivering the same level of innovation and customer service the private sector expects to the public sector organizations that need it most.

<p><b>Purpose-Built for Government</b></p> <p>Concourse exists to serve the public sector. Every product decision, compliance investment, and support process is designed around the realities of government procurement, security requirements, and stakeholder complexity.</p>	<p><b>No Legacy Technical Debt</b></p> <p>Our platform is built from the ground up on modern architecture. No inherited codebases, no workarounds, no technical debt. This means faster deployments, easier integrations, and a system that scales with your organization.</p>	<p><b>Cloud-Native on AWS GovCloud</b></p> <p>Hosted on AWS GovCloud with FedRAMP-aligned infrastructure, our platform provides enterprise-grade security, high availability, and elastic scaling without the overhead of on-premises hardware.</p>
<p><b>API-First &amp; Modular Architecture</b></p> <p>Every component is built as an independent, reusable module with well-documented APIs. This allows flexible customization, straightforward integration with existing systems, and the ability to extend functionality over time.</p>	<p><b>Best-in-Class Integration Engine</b></p> <p>Concourse supports API-first integration, SFTP, RPA, and on-premises connectivity through Concourse Bridge. Our team has prebuilt connectors for hundreds of legacy public sector platforms, reducing integration risk and timeline.</p>	<p><b>Weekly Clickable Prototypes</b></p> <p>During implementation, we deliver new, interactive prototypes every week based on direct stakeholder feedback. You see your specific version in a fully operational context early and often, not just at the end.</p>

## How We Work With You

- We undertake a collaborative discovery process to ensure we are configuring our system to meet your exact needs.

- You will have a dedicated project team working closely with you throughout delivery, and a dedicated account manager post-delivery to ensure ongoing improvements and questions are quickly addressed.
- We deliver weekly clickable prototypes during implementation, incorporating your feedback in real time so the final product reflects your team's priorities.
- We integrate directly with your team's communication channels (such as Microsoft Teams) to facilitate faster feedback and more transparent collaboration.
- Change requests and scope adjustments are welcomed. We discuss openly to ensure we are always aligned with your evolving needs.

## Your Project Team

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Concourse assigns a dedicated project team with defined roles and responsibilities to every engagement. Each member below has a specific function on your project, bringing relevant public sector delivery experience.



### Thomas Smyth

#### Executive Sponsor & Account Lead

Yale University, B.A. • 14+ Years in Software & GovTech • 300+ Public Sector Deployments

Thomas serves as Executive Sponsor and primary account lead for strategic engagements. He has led technology delivery across 300+ municipalities, K-12 school districts, and state agencies over 14 years. Prior to founding Concourse, he held leadership roles at multiple technology companies focused on public sector markets. Thomas oversees client relationship strategy, executive stakeholder alignment, and delivery accountability for every Concourse engagement.

## Rapolas Binkys

### Lead Engineer & Technical Architect

Brown University, B.S. • 11+ Years as Founder, Consultant, Engineer • Full-Stack Architecture & AI



Rapolas serves as Lead Engineer and Technical Architect, owning the full product lifecycle from requirements through production deployment. With 11+ years as an engineer, founder, and technical consultant, he has shipped production systems for dozens of public sector clients. He specializes in cloud-native architecture (including AWS GovCloud), API-first integration design, and AI-driven workflow automation. Rapolas coordinates Concourse's broader engineering team for technical delivery, system performance, and security compliance.



## Ajay Menon

### Project Manager & Implementation Lead

Duke University, B.S. • 6+ Years in Product & Delivery • 15+ Public Sector Implementations

Ajay serves as Project Manager and Implementation Lead, managing day-to-day delivery, milestone tracking, and stakeholder communication. With 6+ years in product strategy and technology deployments, he has led 15+ public sector implementations end-to-end. Previously at a technology advisory firm, he scoped and delivered enterprise solutions for government and education clients. Ajay manages sprint planning, UAT coordination, training schedules, and go-live readiness for each engagement.

## Mike Mumma

### Customer Success & Delivery Operations

Georgetown University, B.A. • 10+ Years in Tech & Consulting • 20+ Agency Relationships Managed

Mike leads Customer Success and Delivery Operations, serving as the primary relationship lead for strategic accounts. With 10+ years in technology consulting and government policy, he has managed relationships with 20+ agencies across state, municipal, and education sectors. Previously a consultant focused on government technology adoption, he brings deep understanding of procurement workflows, compliance requirements, and post-deployment optimization. Mike ensures continuity from implementation through ongoing support and growth.



## Varun Char

### Strategic Advisor & Stakeholder Engagement

Yale Law School, J.D.; Columbia, B.A. • McKinsey & Company • Metropolitan Transportation Authority

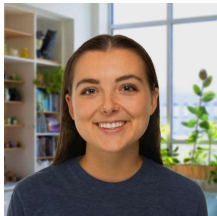
Varun Char is a strategy and operations leader with over a decade of experience driving improvements in large organizations and government agencies. Most recently Director of Strategic Initiatives at the MTA, he led large-scale operational and technology programs for one of the nation's largest transit authorities. Previously at McKinsey & Company, he advised public and private sector executives on strategy, operating model design, and implementation. Varun supports Concourse on executive stakeholder alignment, change management, and initiative planning.

## Jacqueline Moss

### Business Analyst & Requirements Lead

Harvard University, B.A. · Guidehouse (Technology Consulting) · Discovery & Requirements Analysis

Jacqueline serves as Business Analyst and Requirements Lead, owning the discovery process and translating agency workflows into technical specifications. Previously a technology consultant at Guidehouse, she supported complex government engagements spanning requirements analysis, stakeholder coordination, and implementation planning for defense and civilian agencies. At Concourse, she leads discovery workshops, documents functional requirements, and ensures solutions are grounded in real agency operations.



## Emilia Cabrera

### Product Designer & UX Lead

Harvard University, B.S. (CS) · Product Management (Big Tech) · Accessibility & User Research

Emilia serves as Product Designer and UX Lead, responsible for user experience design, interface prototyping, and accessibility compliance. A Harvard CS graduate with honors, she previously shipped user-facing products at leading technology companies, specializing in education and accessibility-focused platforms. At Concourse, she runs weekly design reviews with agency stakeholders, produces clickable prototypes for feedback cycles, and ensures all interfaces meet WCAG 2.1 AA standards.

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## Hannah Teo

### Application Specialist & Client Engagement

SMU, B.S. • Boston Consulting Group • Project Strategy & Roadmapping

Hannah serves as Application Specialist and Client Engagement lead, managing project strategy, configuration planning, and agency communication. Previously at Boston Consulting Group, she supported clients on growth strategy, operational design, and organizational transformation. She combines analytical rigor with an entrepreneurial mindset developed through founding her own venture. At Concourse, Hannah drives project roadmapping, feature prioritization, and end-user training coordination.



## Kelsey Shaner

### Contracting & Compliance Lead

8+ Years in Operations & GovTech • Previously FinTech Operations • Full Procurement Lifecycle

Kelsey serves as Contracting and Compliance Lead, managing the full procurement lifecycle from initial opportunity through contract award and ongoing compliance. With 8+ years in technology operations spanning FinTech and GovTech, she has managed dozens of government contracts and SLA compliance frameworks. At Concourse, she aligns configuration, documentation, and reporting with agency requirements, ensuring contractual obligations are met throughout the engagement.

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## Our Advisors

Concourse is supported by a group of experienced advisors who bring deep domain expertise in government technology, procurement, and public sector operations.



## Brenna Berman

*Chief Information Officer, Chicago (Ret.)*

Brenna served as Chicago's Chief Information Officer and Commissioner of the Department of Innovation and Technology, where she led city-wide data initiatives and smart infrastructure programs. She brings deep expertise in urban technology, open data, and public-private partnerships, and advises Concourse on scaling technology solutions for large municipal environments.

## Greg Smith

*Chief Procurement Officer, Nevada (Ret.); Chairman, NASPO ValuePoint (Ret.)*

Greg served as Nevada's Chief Procurement Officer and chaired NASPO ValuePoint, the nation's largest cooperative purchasing program. He brings unmatched expertise in state procurement strategy, cooperative contracting, and vendor positioning across all 50 states.



## Vern Jones

*Chief Procurement Officer, Alaska (Ret.)*

Vern served as Alaska's Chief Procurement Officer, overseeing statewide acquisition strategy and vendor management. He advises Concourse on procurement compliance, contract strategy, and navigating complex public sector acquisition processes.

## David Gagan

*Chief Procurement Officer, Texas, Indiana, District of Columbia and CFPB (Ret.); Chief Administrative Officer, NASPO Kronos*

David brings more than 48 years of government procurement leadership, having served as Chief Procurement Officer for the District of Columbia, the State of Texas, Indiana, and the CFPB. A CPPO Fellow and National Academy of Public Administration Fellow, he advises Concourse on procurement compliance, contract strategy, and navigating complex public sector acquisition processes.





## Rock Regan

*Chief Information Officer, Connecticut; Public Sector Sales, Qlik, Precisely, Kronos*

Rock served as Connecticut's Chief Information Officer, leading statewide IT strategy and digital transformation. With extensive public sector sales leadership at Qlik, Precisely, and Kronos, he advises Concourse on government market strategy, state-level technology partnerships, and building trusted relationships with public sector decision-makers.

## Recent Awards & Implementations

- Oklahoma OMES
- Oklahoma Ethics Commission
- Oklahoma Water Resources Board
- State of Hawaii Judiciary
- Maryland State Retirement Agency
- Tennessee Dept of Treasury
- South Carolina DOT
- Colorado HCPF
- Los Angeles County
- Ramsey County (MN)
- Dakota County (MN)
- Houston-Galveston Area Council
- Redwood City
- City of Palo Alto Utilities
- Newport, Arkansas
- Owosso, Michigan
- City of Saint Louis Parks
- Sound Transit (WA)
- Greater Cleveland RTA
- Rides Mass Transit (IL)
- Texas State Technical College
- Westmoreland County CC
- Oakland University (MI)
- Wisconsin Technical Colleges
- ESC Region 10

## Customer References

Specific references available upon request.

# Company Information

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<b>Company Name</b>	Concourse Tech Inc.
<b>Contact Person</b>	Kelsey Shaner, Contracting & Compliance Lead
<b>Phone</b>	(646) 305-9964
<b>Email</b>	sales@concoursetech.com
<b>Address</b>	169 Madison Ave, Suite 15520, New York, NY 10016
<b>Trust Center</b>	Relevant documentation (e.g., SOC 2 Type II audit report, VPAT, HECVAT) can be found on our Trust Center: <a href="https://trust.concoursetech.com">https://trust.concoursetech.com</a>
<b>DUNS Number</b>	119359641
<b>CAGE Code</b>	09E17

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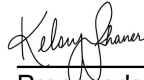


**DRUG FREE WORKPLACE FORM**

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that Concourse Tech Inc.  
does: (name of business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



\_\_\_\_\_  
Proposer's Signature

04/15/2026

\_\_\_\_\_  
Date

**(This form must be completed & returned)**

**HUMAN TRAFFICKING AFFIDAVIT  
for Nongovernmental Entities Pursuant To FS. §787.06**

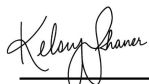
**Charlotte County Contract #20260367**

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.



\_\_\_\_\_  
Signature

Kelsey Shaner

\_\_\_\_\_  
Printed Name

Operations Manager

\_\_\_\_\_  
Title

Concourse Tech Inc.

\_\_\_\_\_  
Nongovernmental Entity

04/15/2026

\_\_\_\_\_  
Date

**END OF PART IV**

(This form must be completed & returned)