



PALM DESERT

Proposal for:

Clariti Land Management Solution for City of Palm Desert

Date: October 24th, 2023



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Table of Contents

1.	Letter of Transmittal.....	3
2.	Executive Summary	4
3.	Company Overview	6
4.	Project Scope.....	14
5.	Proposed Solution	18
6.	Project Management & Delivery.....	33
7.	Implementation Methodology	39
8.	Data Conversion Approach	45
9.	Training.....	49
10.	High-level Work Plan and Schedule	52
11.	Project Timeline.....	53
12.	Proposed Delivery Team	54
13.	Assumptions & City Involvement.....	57
14.	Maintenance & Support	61
15.	Fees and Payment Schedule	66
16.	Term & Termination	69
17.	Signature.....	70
18.	APPENDIX A - Case Studies.....	71



1. Letter of Transmittal

October 24, 2023

Re: Clariti Land Management Solution for City of Palm Desert

Dear Sir/Madam,

Thank you for the opportunity to submit our proposal for the City of Palm Desert's next generation Land Management Software System.

Speridian Technologies is a global IT Services & Consulting firm providing innovative, value-based, state-of-the-art solutions that digitally transform the way our customers do business - in both commercial and public sector - making it easier and more desirable for their customers and citizens to engage.

Together with our strategic partner, Clariti, we are excited to present their industry leading licensing, permitting, inspection, and case management solution for Land Management built on Salesforce.com, which is world's #1 cloud platform as a service.

After considering City's requirements, the degree of fit of the Clariti Land Management solution coupled with our delivery experience, we are confident our team can digitally transform the City enabling the best possible experience for its citizens.

With our proven track record of meeting project and service delivery objectives on time and within budget, our Speridian team leverages over 20 years of solutioning success bringing the latest technologies (like Salesforce / Clariti) and associated capabilities to solve our customers' most pressing problems and challenges with a long-term vision/horizon.

We believe Our Team is uniquely positioned to make this initiative successful, and we look forward to working with the City of Palm Desert.

Thank you for your consideration.

Warm Regards,



Scott Weiler

VP Salesforce Growth & Strategy

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2. Executive Summary

Speridian Technologies is excited to have the opportunity to submit this proposal and equally excited to present our Clariti Land Management solution for the **City of Palm Desert**.

Together with our strategic partner, Clariti, we are proposing a proven comprehensive cloud-based, game-changing solution that will enable efficiencies, enhance the City's citizen experience, and provide a "one-stop-shop" for Land Management, along with the corresponding planning, licensing, permitting and enforcement functions for the City.

As we have seen with other Cities and Municipalities, our vision is to digitally transform and your existing policies and procedures with best-in-class process automation, quality-based data management and conversion, proven system integration with proven industry-leading Commercial-Off-The-Shelf (COTS) software.

Our proposed solution is designed to be intuitive and friendly in terms of experiences and operations. It will be implemented with an intent of increasing the citizen interactions and transactions in line with the City's mission & vision.

As a global solution provider of high-quality and cost-effective consulting services, our proposed team will be comprised of a blended team led by key folks from the USA (Project Manager, Business Analyst, Solution Architect, Clariti Specialist, and Lead developer). The USA-based team will be working onsite as scheduled per the agreed upon project plan together with our offshore technical / development team. This blended approach provides our most cost-effective delivery model without compromising quality.

Our track record of successfully executing projects for Local and State government agencies throughout North America over the last five plus years is a testament to the many areas where we have added value.

Our people and services have enabled agencies to successfully modernize their case and community management systems.

Solution Overview:

Speridian proposes implementing the Clariti Land Management Solution. - a highly configurable, easily maintainable system that will be designed and configured exclusively for **City of Palm Desert**.

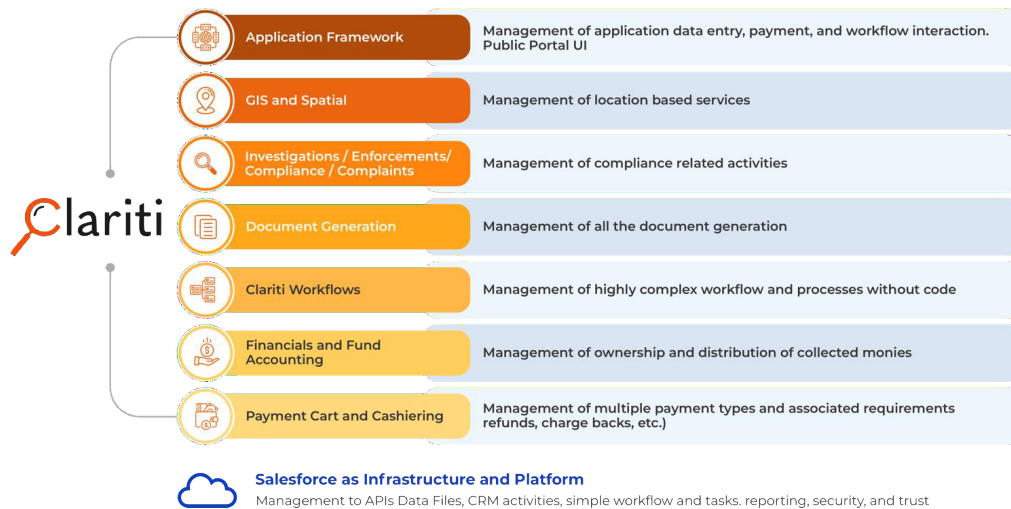
The cloud-based Software-as-a-Service (SaaS) solution has been proven for similar Cities and Municipalities across North America with best-in-class security, performance, and flexibility built on the worlds most trusted and innovative platforms.

Our proposed solution provides consistent ground-breaking innovation for Public Sector



agencies. The solution utilizes native Salesforce to augment the business functionality necessary to deliver a comprehensive Licensing, Permitting, Inspection and Enforcement for Land Management.

Since Clariti solution is pre-built to specifically address the business needs and services of permitting, inspection, and enforcement management, we are able to greatly enhance the functionality the **City of Palm Desert** receives while reducing the time and risk to implement.



The following fundamental differentiators make Speridian the clear choice to partner with **City of Palm Desert** in this implementation:

- We are a company focused on Systems Integration, Case Management, Permitting, Licensing and Inspection Management and CRM solutions.
- We are a Salesforce and Clariti Partner specializing in implementing Salesforce within the Public Sector and Commercial Clients with extensive experience serving the State of Florida.
- We are experienced working with
 - public sector clients and familiar with ITIL, COBIT, and GO I&IT Standards for privacy, security and AODA standards for accessibility and
 - leading technologies integrating and operationalizing document management, IVR/Telephony, and legacy back-office integration.
- We use industry best-practices and mature processes in our Service Delivery, and are an ISO, PMBOK and CMMI-5 Certified company.
- For this engagement, we have selected a senior team of Salesforce/Clariti professionals. Our team are members of our Salesforce Center of Excellence for Public Sector with experience working with various local and state agencies.
- We leverage the best aspects of Agile-based disciplines across our projects and look for opportunities to help our clients take advantage of enhanced Application Lifecycle Management and Continuous Integration and Continuous Delivery capabilities and benefits.

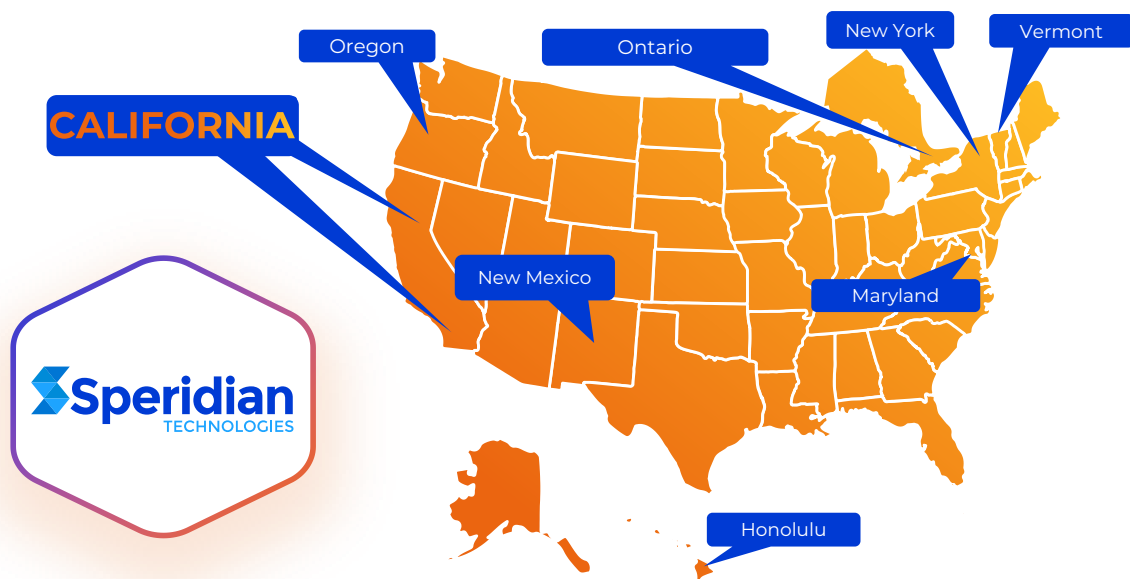


3. Company Overview

Speridian, founded in 2003, is a US based Systems Integrator with clients in the public and private sectors. We offer high-caliber, reasonably priced technology services globally. We are a CMMI Level 5, ISO 9001:2008, and ISO/IEC 27001:2005 certified company with more than 2100 employees worldwide having a wide range of technical and business expertise.

Speridian At a Glance

A solutions & consulting company



 **400+**
Global Clients

 **19+**
Years of Innovation

 **2100+**
Employees Worldwide

The majority of Speridian Technologies’ engagements are large-scale ones, where Speridian provides Planning, Technology Architecture, Software Development, Systems Integration, Program Management, Project Management, Process Management, Data Management, Implementation, Testing and Quality Assurance as well as Applications Support and Maintenance for a variety of clients in many industries.

Speridian has chosen Clariti Cloud Inc. (“Clariti”) as a solution of choice for the city because it is the leading application for supporting the business of local government. Clariti as a solution bring complex land management solutioning to life with its fully configurable capabilities that City’s staff can update with clicks, not code.



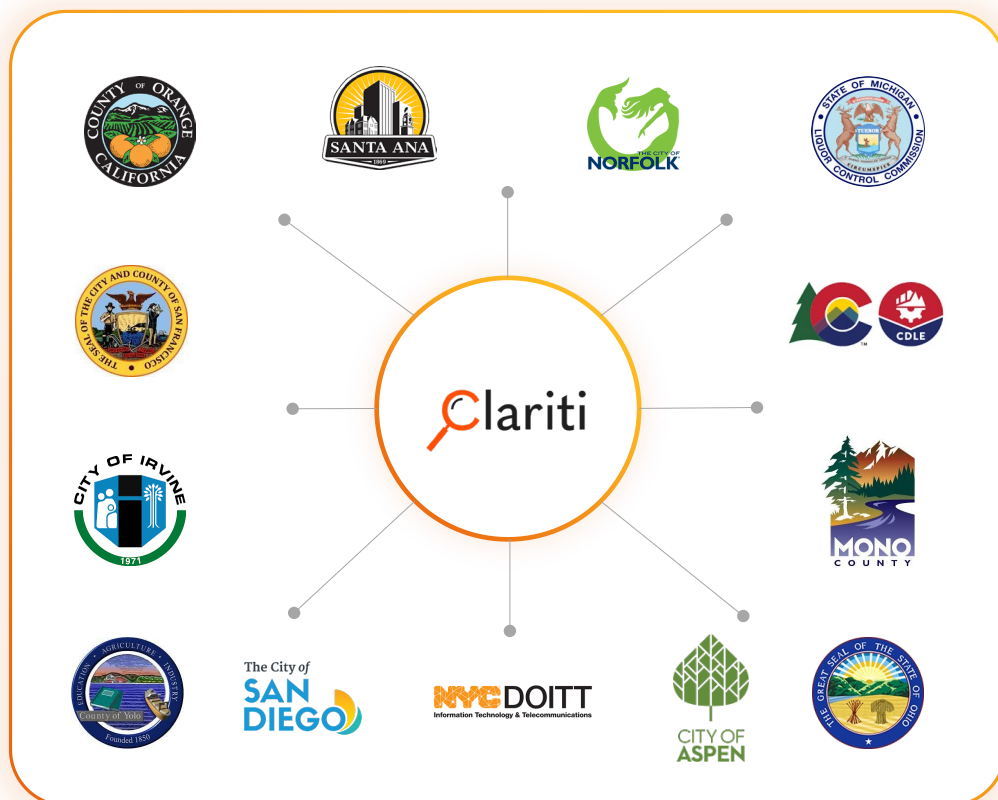
3.1 Speridian – Clariti Partnership

For the last 3 years Speridian has been partnering with Clariti for implementing licensing, permitting and Inspection solutions to modernize public sector agencies operations, improve internal workflows, and deliver exceptional services to citizens. Speridian along with Clariti has helped public sectors reach a new level of service delivery exceeding their citizen’s expectations.

Clariti has been trusted by public sector agencies since its start in 1985 when it was part of Municipal Software, a technology company founded by former government employees who were frustrated with their permitting and licensing systems. This company grew to support over 300 customers.

By 2006, the company knew the future lay in cloud technology and were early adopters of the Salesforce cloud platform, becoming one of its first Tenant Partners for public sector. Emerging as a separate entity, Clariti (then known as BasicGov) began offering Software-as-a-Service (SaaS) modules for permitting, licensing, inspections, planning, code enforcement, fund accounting, and payment/billing management.

Bringing over 35 years of government experience with a solid corporate history, Clariti’s leading-edge applications help government empower their citizens and businesses through modern self-service community portals that achieve performance and efficiency goals.



3.2 Our Experience

Speridian in Public Sector

As a global provider of high-quality and cost-effective consulting services focused on clients in the public sector with a rich history across North America, Speridian brings both depth and experience in modernizing mission-critical systems for Public Sector organizations like the City of Palm Desert.

Our track record of successfully executing projects for Local and State government agencies throughout North America, particularly over the past 5+ years is a testament to the many areas where we have added value.

Below is a representation list of our public sector clientele

Client	Project Description
NY State Insurance Fund, DMV, DTF	Citizen web portal ad part of Case Management and Contact Center modernization
State of Oregon	Developed a case management solution for Medicaid Tax Reporting System (METS) for Oregon Health Authority.
Dekalb County	Implemented Speridian's GovCX 311 citizen experience portal
Ontario AGCO	Implemented Salesforce Contact Center solution, which included integrating Salesforce Service Cloud with AWS Connect
Philadelphia Housing (PHDC)	Speridian deployed a mobile field service application to run on Smartphones and iPads carried by PHDC field inspectors. The application provided an easy and efficient tool, which could be leveraged by the City's field service personnel to complete inspections quickly and effectively.
State of Hawaii	Deployed portal and call center modernization for the Hawaii Child Support Enforcement Agency (CSEA). Implementing Clariti Permitting, Licensing, & Inspection solution for Department of Commerce and Consume Affairs (DCCA).



In California

With offices in Irvine and Sacramento, Speridian has been serving citizens, agencies, and commercial businesses in the State of California for over a decade. Here are some of the entities with whom we have done or are doing business with in California:

Speridian in California



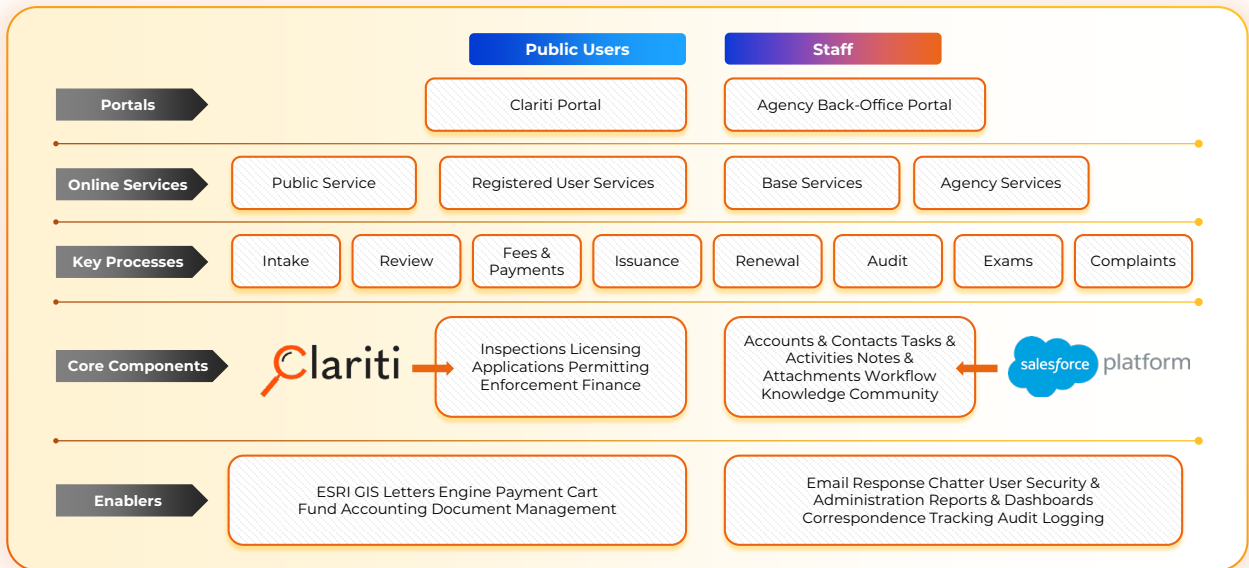
Clariti Solution in California




3.3 Solution Overview – Clariti Land Management Software

Speridian Engages with Clariti to provide land use management, permitting, and code compliance and case management software on a platform, citizens can truly rely on. Together with Clariti, we have helped public sectors to reduce the time it takes for them to issue permits and freed them of bottlenecks caused by endless paperwork and administrative processes.

Here is the high-level Clariti Architecture diagram.



3.4 Recent Engagements

- **Orange County Public Works (OCPW)**

OCPW was looking to modernize the way the Country does business with (including general public, applicants, residents, surveyors, engineers and developers) and general citizen engagement by developing electronic processes to support developers and the public in their interactions for county services. OCPW selected Clariti to act as a comprehensive system that can accept input, organize, process and track development related permits, cases and entitlements through the entire development process. The flexibility in the solution also addresses non-development related workflows such as Code Enforcement, Business Registration and Public Works maintenance/repair requests. The Clariti solution helped OCPW realize many benefits including but not limited to:

- ✓ Providing tools to increase efficiency and responsiveness from OCPW Staff with customers
- ✓ Improving efficiency and performance country within operation
- ✓ Monitoring and reporting usage statistics to agency management
- ✓ Tightly integrating the solution with the preferred Salesforce CRM Platform
- ✓ Integrating with the country's GIS

- **City of Hampton**

The City of Hampton (pop. 137,000) uses Clariti to handle all land management and permitting functions servicing citizens and developers. The entire solution is hosted on the Salesforce platform and features a variety of out-of-the-box tools specific to the permitting and inspection solution that is deployed with all Clariti customers. These tools include workflow management, document creation, financial transaction management, payments management, ESRI GIS Sync and ESRI Map Viewers. It features a portal for purchasing permits online, as well as handling all transactional reporting.

The solution manages the workflow related to issuance of permits, resulting inspections, and final compliance of an issued permit. The city also implemented a Clariti mobile inspection solution as part of a larger Community Development system project. The project involved implementation for 110 unique users/seat, multi-module deployment that includes enforcement, compliance, licensing, permitting, planning, local cashiering, and online payments. Inspectors in the Community Development Department respond to complaints and inspection requests in the field with the Clariti application, powered by the Salesforce Platform and integrated with the City's ESRI Geographic Information System (GIS). More than 40 remote inspectors are using Clariti for detailed mechanical, electrical, and other inspection types against permits and property.



- **Halton Region**

Speridian upgraded and modernized the 311 Case Management system for Halton Region (pop 610,000).

- ✓ Upgraded and modernized the Halton region 311 call center.
- ✓ Integrated Modernized Computer Telephony Interface with Case Management application.
- ✓ Implemented Single Sign-on and Integrated windows authentication.
- ✓ Upgraded reporting and dashboard capability.
- ✓ Improved overall efficiency and workflow supporting 300
- ✓ Concurrent Users, with 7 days of operations and 24-hour portal access.

- **LRC – OMAFRA**

Speridian upgraded and modernized the Case Management system for LRC. As part of the modernization program, Speridian carried out an in-depth AODA compliance analysis and presented the recommendations. Speridian adjusted the User Experience based on the recommendations to make the platform compliant with AODA standards for both internal staff and external (public) users.

- ✓ Upgraded and optimized Case Management System.
- ✓ Integrated windows authentication – SSO
- ✓ Implemented ONEKY and Go Secure Integrations
- ✓ Upgraded reporting and dashboards.

Speridian did the AODA Analysis and Compliance.

- **Province of Ontario**

Speridian upgraded and modernized the CMOD (Case Management on Demand) application. As part of the modernization, Speridian did the AODA compliance analysis.

- ✓ Upgraded CMOD environment.
- ✓ Implemented User Interface and workflow enhancements.
- ✓ Upgraded reporting and analytics.
- ✓ Integration with One-Key and Go-Secure
- ✓ Implemented Microsoft Exchange integration.
- ✓ Upgraded Email correspondence templates.
- ✓ Upgraded Security Infrastructure and SSL encryption from



Our Proposed Solution in California

There are a significant number of Cities, Municipalities and Counties in the State of California using or committed to using our Clariti-based solution for Land Management and Community Development, including



"The City looks forward to having a fully integrated electronic plan review, business license, code enforcement, building inspection, and customer service portal all on one platform. This new technology will enhance our business process, increase efficiency, and improve customer experience."

Pete Carmichael
Community Development Director



"We were looking for a solution to replace our 20-year-old homegrown land management system that still requires citizens to come to City Hall to apply for a permit and for staff to print multiple paper copies at each step of the permitting process. We're excited that with Clariti, all of our permitting needs will be handled through the online community portal. This will greatly improve the experience for both citizens and staff."

Jack Ciulla
Chief Technology Innovations Officer



"With Clariti, anything you can do in-person, you can do online - it even accommodates our large-scale developers' needs."

Judy Kim
Permitting Manager

10



4. Project Scope

4.1 Our Understanding

Speridian and Clariti understand that the City of Palm Desert is undertaking a strategic modernization effort address the end-to-needs of Land Management across citizens and City departments, like Development Services/ Public Works, Finance, and IT.

We understand that the City requires our team to be living in (and working from) USA and being onsite as required by the agreed upon project plan

The proposed implementation and corresponding SOW will cover the to-be determined experience for a core set of users and citizens that will be determined during the Discovery phase of the project and based upon the initial information that has been provided by the City, which includes

- Our Responsibilities
- Expected Users
- Infrastructure
- Expected Departments & Processes
- Expected Project Types & Codes
- Integrations
- Data Conversion
- Training

* We understand there may be additional details/requests

4.2 Our Responsibilities

- Project Management
- Design/ Requirements
- Process Configuration
- Integration Development
- Report / Forms Development
- GIS Setup
- Data Conversion Mapping
- Data Conversion
- User Acceptance Testing, i.e., Full facilitation of UAT and include Onsite Travel if applicable
- Onboarding Training: 1 Week
- Admin/ Configuration Training: 3 Weeks
- UAT Training: 2 Weeks
- End-User Training*: 3 Weeks
- Post Go-Live Warranty Support: 4 weeks post-Go-Live (Mon - Fri)

*Note: No **Train-the-Trainer** approach; All users to be trained by Vendor

4.3 Expected Users

- Full Access Users 120
- Read Only Users 5



4.4 Infrastructure

- Online Submission Form - Palm Desert FTP; Not Currently Integrated
- Inspections Scheduling - Manual process
- ERP - Central Square - Finance Enterprise for Core Fin.
- Cashiering and Counter payments - Payments taken through TrakIt and daily batch to Finance
- Credit Card - Separate swipe device and Avalon is payment processor
- Online Payments - Avalon payment processor
- Electronic Plan Check - Bluebeam
- Records Management - Laserfiche; Currently Integrated with TrakIt - Single file import based on manual trigger to transfer documents from TrakIt to Laserfiche
- GIS Infrastructure - ESRI ArcGIS 10.9.1, ArcGIS Online, ArcGIS Portal
- IVR – No

Annual Counts (Approximate)	2020	2021	2022 (as of 9/15)
# of Payment Transactions (Receipts)	3,302	7,674	3,924
# of Permits Applications	3,334	4,861	4,451
# of Plans (Projects) Applications	156	155	111
# of Inspections (From Permits) Completed	4,730	5,753	4,048

4.5 Expected Departments

- Development Services/ Public Works
 - Building & Safety
 - Land Development
 - Planning
 - Public Works (Permits Only, No CIP)
 - Code (Permits Only, No Code Cases)
 - Special Programs
- Finance
 - Online Payments
 - Payments Posting
 - Refund Issuance
 - Deposit Tracking
- IT
 - Infrastructure & Hardware
 - Productivity Applications
 - GIS



4.6 Modules

- Permit Management
- Permit Inspections
- Planning Projects Management
- Retail (Over the Counter) Payments
- Digital Plan Check and Mark-up (Bluebeam, etc.)
- Online Plan Submissions
- Online Simple Permit Issuance
- Online Contractor Verification
- Online Plan/ Permit Record Search
- Online Inspection Requests
- Online Payments
- Deposit/ Escrow Management
- Hosted Reports Development (City-self development)
- Bond Mgmt
- Advanced Support & Maintenance - up to 20 hours per month

4.7 Integrations

Integrations	Type	Freq	Notes
California Contractor State License Board	1-way	Real-time	New - not currently available
Ability to integrate with electronic plan check system (Bluebeam)	2-way	Real-time	Current - staff uses Bluebeam, but not currently an integrated experience with LMS
Ability to integrate with ERP (CentralSquare Finance Enterprise)	1-way	Nightly Batch	Current - a nightly batch process and will need this to remain the same
Ability to integrate with Retail (counter) Credit Card Processor (Avalon)	2-way	Real-time	Current - there is a separate swipe machine for credit card payment processing (Avalon) that is not integrated with the payment system. Would like to consider an integrated credit card swipe.
Ability to integrate with Online Credit Card Processor (Avalon)	2-way	Real-time	Current - payment gateway integrates with Elavon payment processing and will need to remain the same
Ability to integrate with Document management system (Laserfiche)	2-way	Real-time	Current - Individual file import based on manual trigger initiated by user to transfer documents from TrakIt to Laserfiche; A near real-time integration / batch process based on attachment type/status and permit status (only send completed project files to Laserfiche)
Ability to integrate with GIS - ESRI/ArcGIS 10.9.1, ArcGIS Online	2-way	Real-time	Current - one-way integration of updated address/ parcel data loaded into TrakIt

4.8 Data Conversion

It is understood that for this Clariti implementation, Data Conversion will be required from the City's TrakIt - Community Development system. It is expected that Speridian will require a) support from the City's IT SMEs and b) access to actual production data extracts and documents during the conversion phase. The IT support and availability of extracts is critical to the success of the conversion phase.



A breakdown of the TrakIt data, dating back to 2016, is as follows:

- # of Permit Records (PermitTRAK) 101,926
- # of Inspection Records 1,132,834
- # of Planning Records (ProjectTRAK) 3,742
- # of Addresses/Properties (LandTRAK) 87,004
- # of Contacts (AECTrak) 4,558
- # of Attachments Files 116,327
- Attachments Volume 167 GB

4.9 Reports & Forms

- Statistical Reports 20
- Letters and Forms 20

4.10 Payments & Deposits

- Retail Fee Payment Types
 - Cash
 - Check
 - Credit Card - Visa, Mastercard (Alavon)
 - Deposit Payment - Account for Multiple Permit/ Plan Payment
 - Deposit - Singled Permit/ Plan
- Online Fee Payment Types
 - Credit Card - Visa, Mastercard (Avalon)
 - eCheck

4.11 Case Types (~350-400)

- Building & Safety: 161
- Code (Permits): 4
- Land Development: 13
- Planning 148
- Public Works(Permits) 41
- Special Programs: 15

4.12 Training

The steps involved in the training sessions are:

Step 1: Classroom Sessions will be used to explain the implemented modules, user stories, configuration, and customization.

Step 2: This is followed by a demonstration of the functions on the new system. The sessions also include time for hands-on where the State's Users practice the business concepts explained during the sessions.

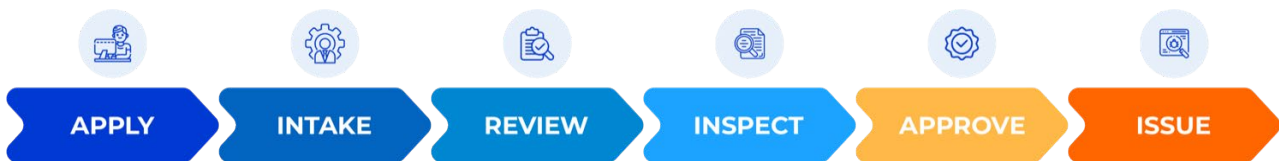
Step 3: Users undergoing the training are given tests (blend of theory and practice) through self-paced learning guides to assess their understanding of the concepts.

In addition, Speridian will work with the City in assembling custom videos, or record the trainings for City Staff to refer to and to onboard future employees we would like the cost for that service included in the quote as well.



5. Proposed Solution

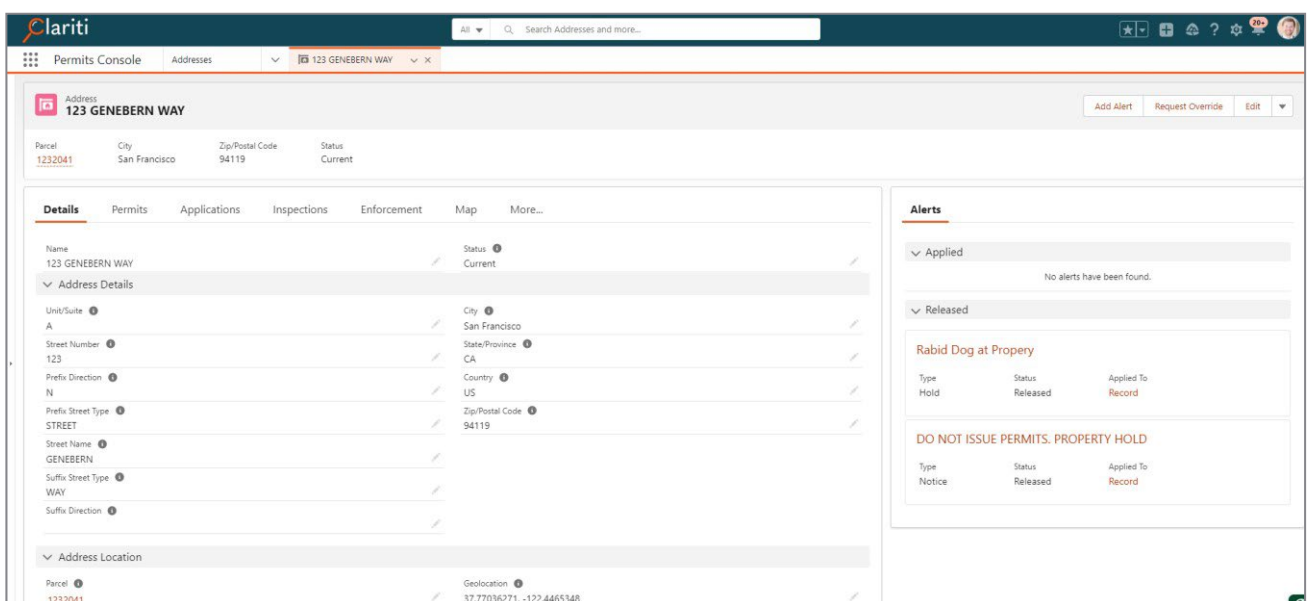
Speridian and Clariti understand that each City is unique but follows a general pattern in permitting and licensing (as seen in its simplest form below). Note, we recognize that some areas require additional review/approval cycles before issuance.



The following is a brief description of each core Clariti module along with sample screenshots.

5.1 Addressing

Speridian and Clariti understands that an important aspect of land management is the ability for the City generate and assign new addresses within parcels and plots of land. This functionality should be native to solution and be fully integrated with the City's GIS system, allowing for a two way integration between the two. Clariti also understands that the addressing component, while required to be displayed on the built in GIS map viewer, may only be required to be viewed within the land management solution and not synchronized back to the City's GIS. Clariti supports both of these methods with the built in addressing functionality; allowing the City to be flexible with their requirements while empowering the City to manage and maintain addresses.

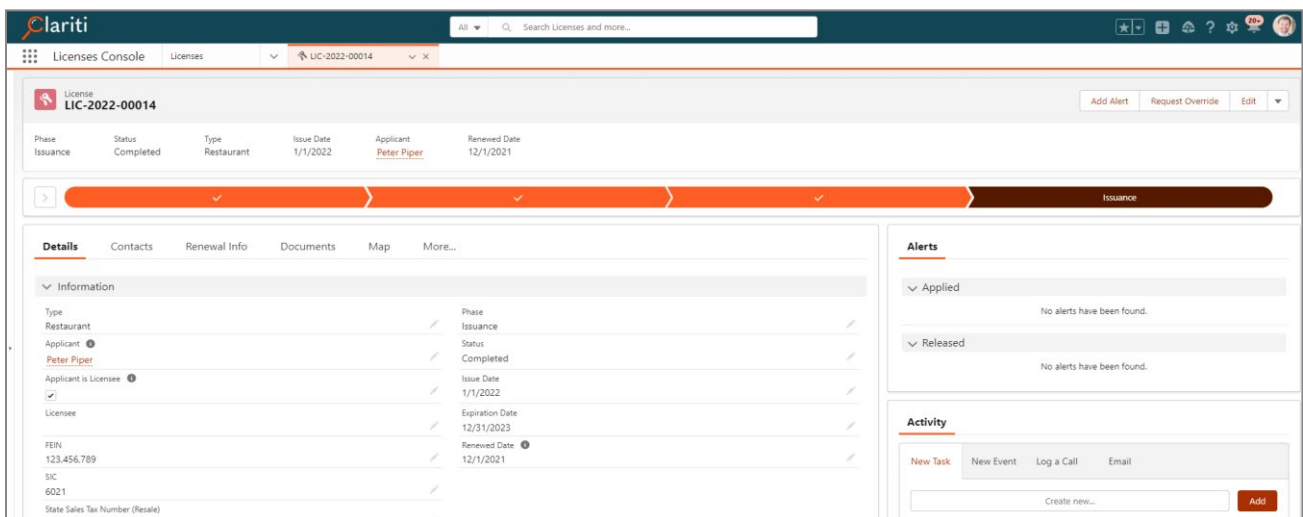


The screenshot displays the Clariti web application interface for address management. The main content area shows details for the address 123 GENEVERN WAY in San Francisco, CA. The details are organized into sections: Address Details (Unit/Suite, Street Number, Prefix Direction, Prefix Street Type, Street Name, Suffix Street Type, Suffix Direction) and Address Location (Parcel, Geolocation). The Status is listed as 'Current'. On the right side, there is an Alerts section with two categories: 'Applied' (No alerts have been found) and 'Released'. A specific alert is shown: 'Rabid Dog at Property' with a Type of 'Hold', Status of 'Released', and Applied To 'Record'. Below this, another alert is shown: 'DO NOT ISSUE PERMITS. PROPERTY HOLD' with a Type of 'Notice', Status of 'Released', and Applied To 'Record'.



5.2 Licensing

Licensing is one of the foundational software components of Clariti. Clariti can process license registrations and renewals. With increasing customer expectations and demand, the system can be configured to allow an applicant to enter all or part of their application information directly into the system via a web application. This eliminates the redundant data entry and reduces internal effort. Alternatively, these applications can also be handled through a centralized intake process where staff receive hard copies of application forms, verify the information, and then create the corresponding records in the system. In many instances, organizations offer both options to meet the needs of a wide range of customers.

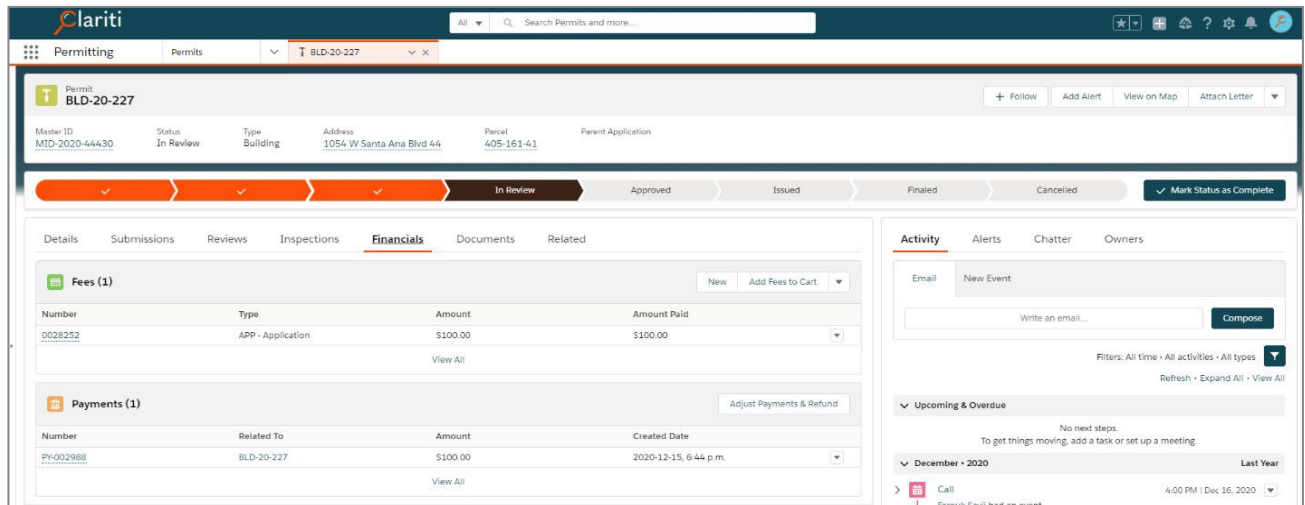


All aspects of government licensing may be accommodated within the Clariti system including application, renewal, reinstatement, suspension, reactivation, transferal, termination, etc. These conditions are achieved by configuring the appropriate workflow within the Clariti system. The workflow may also be configured to create and issue related documentation and certificates. The documents may be created and distributed automatically (or manually) as required by the organization's policies and procedures.



5.3 Cash Receipting

The Clariti solution enables both front- and back-end users to pay fees directly online. The fees will be calculated automatically with Clariti workflows and payment of the fee may also trigger additional workflows or updates (such as application status) to occur. The online payment system can be integrated with a payment gateway using Web Service APIs.



Clariti also offers a robust financial package that allows for payments, refunds, deposits, and fund accounting. Payment of the application may be configured as a condition for application approval, ensuring license fees are collected prior to issuing any documentation or certificates to the applicant. Additionally, the Clariti Payment Cart allows for deposits to be managed and used to pay down incurred costs.

5.4 Code Enforcement

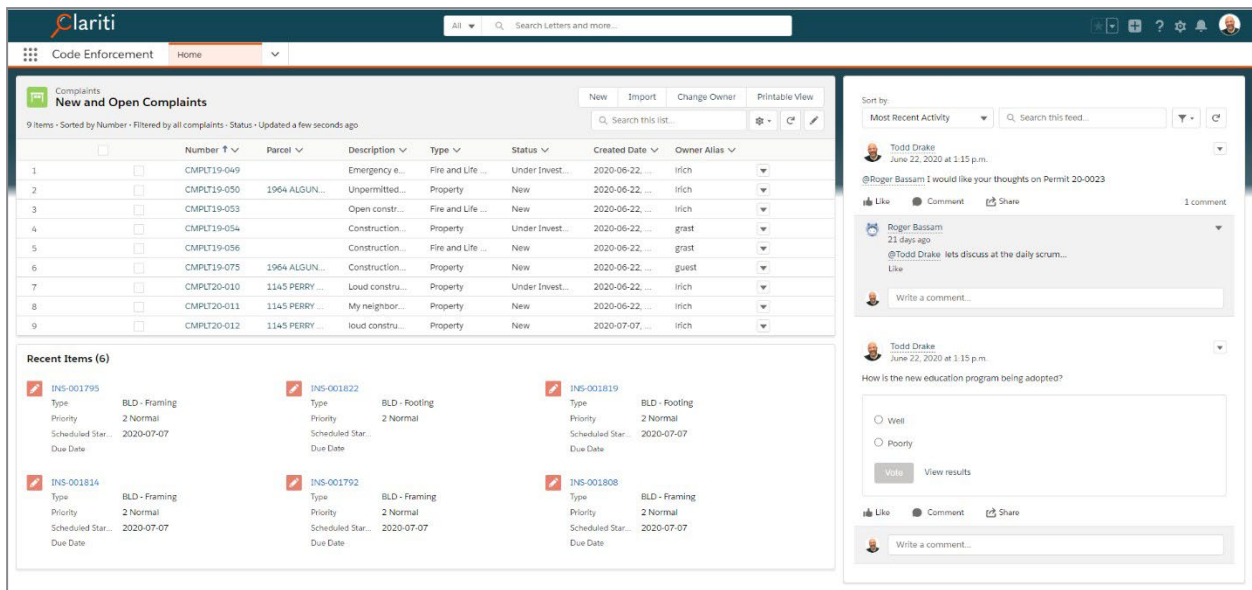
Clariti has an Enforcement module that can manage and track cases from complaint to resolution including aging records with violations, generating compliance dates, automating notifications, and preparing documents for boards.

5.5 Complaints

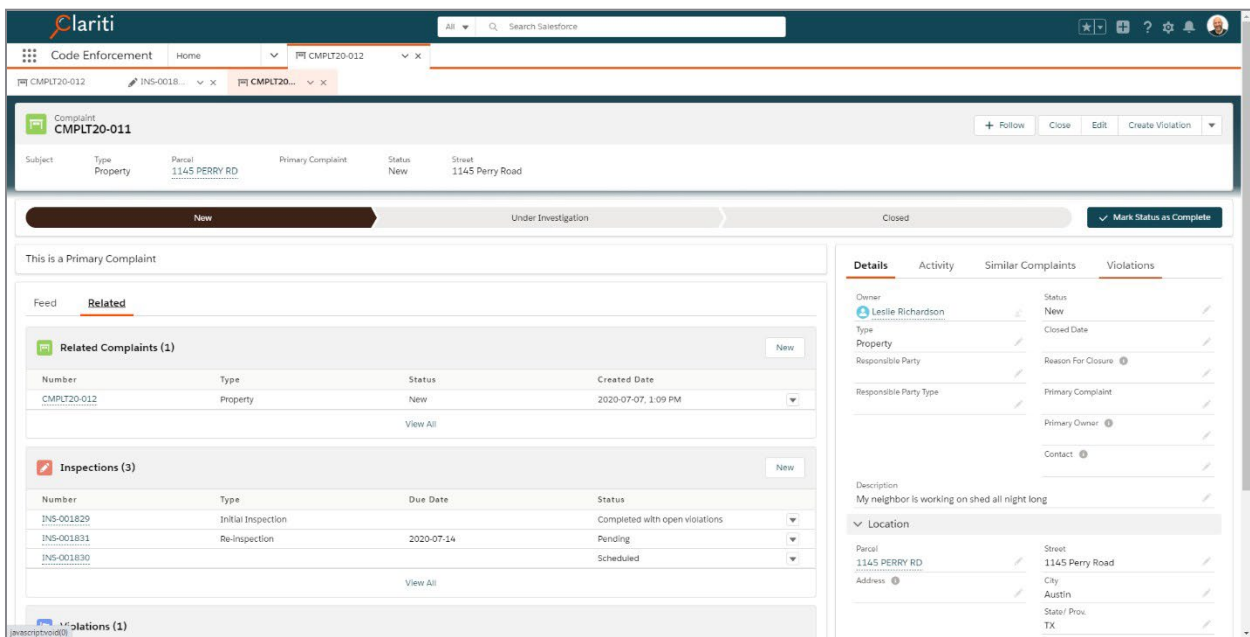
Complaints provide the ability to accept complaints or service requests from citizens or registered users. A complaint can be created against a Parcel, License, Contact or Account. Within the system, authorized users can triage, review and support the resolution of the complaint.

Public users can access a complaint form and submit their complaint to the appropriate agency. Users can also upload supporting photo or documentation to their complaint forms.





The screenshot shows the Clariti Code Enforcement dashboard. The main section is titled "New and Open Complaints" and contains a table with 9 items. The table columns include Number, Parcel, Description, Type, Status, Created Date, and Owner Alias. Below the table is a "Recent Items (6)" section displaying a grid of inspection cards with details like Type, Priority, Scheduled Start, and Due Date. On the right side, there is a social feed with user avatars, names, and comments.



The screenshot shows a detailed view of a complaint in the Clariti Code Enforcement system. The complaint ID is CMPLT20-011. The subject is "Property" at "1145 PERRY RD". The status is "New". The dashboard includes a progress bar showing the complaint's status from "New" to "Under Investigation" to "Closed". There are sections for "Related Complaints (1)" and "Inspections (3)". A "Details" panel on the right lists fields such as Owner (Leslie Richardson), Property, Responsible Party, and Location (1145 PERRY RD, Austin, TX).

5.6 Violations and Ordinances

The Clariti solution provides a complete enforcement module that builds on the functionality of the inspections capability to provide for violations tracking based on statutes, laws, and regional or statewide ordinances. These statutes, laws and ordinances can be uploaded and/or created using the ordinance editor as shown in the image below. This content can also be used on letters, either including the full description, or in most cases the “short description”.

Workflows will determine next steps on the violation and can include fines, additional inspections, citations, and other activity.



Clariti Code Enforcement Home CMPLT20-012

Complaint **CMPLT20-011**

Subject: Property, Type: Property, Parcel: 1145 PERRY RD, Primary Complaint: Under Investigation, Status: Under Investigation, Street: 1145 Perry Road

Progress: Under Investigation (Active), Closed

This is a Primary Complaint

Feed | **Related**

Related Complaints (1)

Number	Type	Status	Created Date
CMPLT20-012	Property	New	2020-07-07, 1:09 PM

Inspections (3)

Number	Type	Due Date	Status
INS-001829	Initial Inspection		Completed with open violations
INS-001831	Re-inspection	2020-07-14	Pending
INS-001830			Scheduled

Violations (1)

Details | **Activity** | **Similar Complaints** | **Violations**

Status: Open

Type: Noise Control - After hours

Comments: Every person who violates any provision of this bylaw commits an offence and is liable to a penalty of not more than \$2,000 and not less than \$100 for each offence, and the costs of prosecution. Each date that a violation occurs constitutes a separate offence.

Violation Description: No person shall make or cause, or permit to be made or cause, any noise in Electoral Area "F" of the Regional District, which disturbs, or tends to disturb, the quiet, peace, rest, enjoyment, comfort or convenience of the neighbourhood, or of persons in the vicinity.

5. No person shall own, keep or harbour any animal or bird which by its cries, barks or other noises, disturbs the quiet, peace, rest, enjoyment, comfort or convenience of the neighbourhood, or of persons in the vicinity.

6. No person shall operate, use or allow, permit or cause to be used or operate any public-use amplifier, hi-fi system, power stereo amplifier system, audio amplifier, music amplifier, still.

Compliance Due Date: Jul 16, 2020

Clariti Code Enforcement Home CMPLT20-012

Complaint **CMPLT20-012**

Subject: Property, Type: Property, Parcel: 1145 PERRY RD, Primary Complaint: New, Status: New, Street: 1145 Perry Road

Progress: New (Active), Under Investigation, Closed

This is a Primary Complaint

Feed | **Related**

Post: Share an update...

To: Clariti Only

Sort by: Most Recent Activity

INS-001828 - Leslie Richardson (Clariti) created an Inspection. July 7, 2020 at 1:09 p.m.

Similar Complaints

CMPLT20-011 [Link]

Subject	Type	Parcel	Primary Complaint
	Property	1145 PERRY RD	

Status: New, Street: 1145 Perry Road, State/Prov: TX

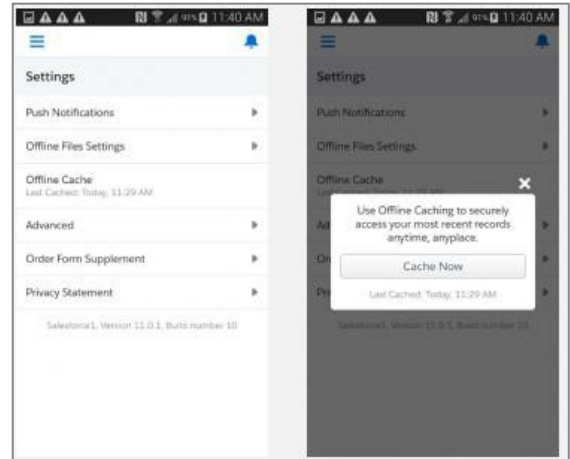


5.7 Mobility

Integrated mobile inspection solutions have become a key requirement for agencies as regulations become more complex and the consequences of non-compliance can have a significant impact on the citizens and community at-large.

When connected to the Internet:

- The functionality works the same on any device. The proposed solution provides mobile access for all areas of the system under the assumption the mobile device is connected to the Internet.
- As the inspector logs in they will see dashboards very specific to their zone or specialty.
- This feature is included with the solution as there is NO customization required.



We have a dedicated app that allows City staff to be completely mobile, regardless of internet connectivity, using an Android or iOS tablet or phone or watch. When disconnected from the Internet.

5.8 Automated Workflow

In Clariti, a flow is an application that automates complex business processes. Simply put, it collects data and then does something with that data.

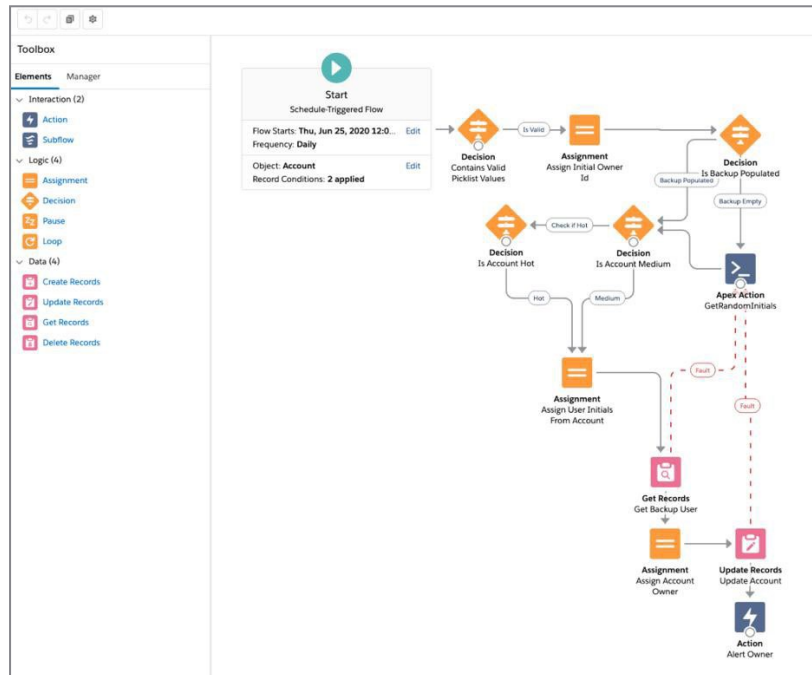
Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language.

Flows fall into five categories:

- Screen Flows:
 - These are flows that have a UI element and require input from users. These types of flows are either launched as an action or embedded as an element on a Lightning page.
- Schedule-Triggered Flows:
 - These auto-launched flows launch at a specified time and frequency for each record in a batch, and they run in the background.
- Auto-launched Flows:
 - Run automated tasks with this flow type. Auto-launched flows can be invoked from process builder, from within an Apex class, from a set schedule, from record changes, or from platform events.
- Record-Triggered Flows:
 - These auto-launched flows run in the background when a record is created, updated, or deleted.



- Platform Event-Triggered Flows:
 - When a platform event message is received, these auto-launched flows runs in the background.



5.9 Document Management

Clariti already has a number of different areas in which documents can be managed. These include:

- **Files Home:** In the Files Home area, documents can be uploaded by a user and then shared with City staff or the public for communal use. The uploaded files can be viewed and customized from all end devices.
- **Clariti Content:** This tool allows users to create a number of documents of different types, share them with other City staff, edit them collaboratively, or share them with external users.
- **Clariti Knowledge:** This provides a space for sharing articles designed to support knowledge transfer. These can also be separated by theme into individual libraries. The articles can then be shared with colleagues or external users via an online platform.
- **Documents Tab:** Visualforce files can be stored in this area (e.g., logos).
- **Attachments:** This functionality can be used to attach files of various types to data records (e.g., contracts, quotes, etc.).
- **Submissions:** These are the documents the public (applicants, complainants, etc) would be submitting to the City to support an application, an inspection, a complaint, etc.



The files uploaded to the individual libraries are then easy to find via Clariti's Global Search tool. Files can be ranked (or made easier to find) by adding metadata such as a title, description, and/or tags. True document management capabilities, such as approval processes, can only be added using the Process Builder or Flows (and your own logic!).

Clariti allows you to connect storage systems such as Google Drive, OneDrive, Box, or other services via the Files

Once a file has been transferred to storage in Clariti, a number of document-level functions become available:

- **Viewer:** Salesforce's default viewer allows users to preview documents. Additional functions, such as zooming, are not available.
- **Download:** The files can be downloaded.
- **Share:** Documents can be shared with internal Salesforce employees.
- **Public link:** Generating a public link allows the user to share a document with people outside Salesforce.
- **Upload new version:** Users can upload a new version of the document.
- **File details:** This is where you can add some metadata to the document (title and description are the default).

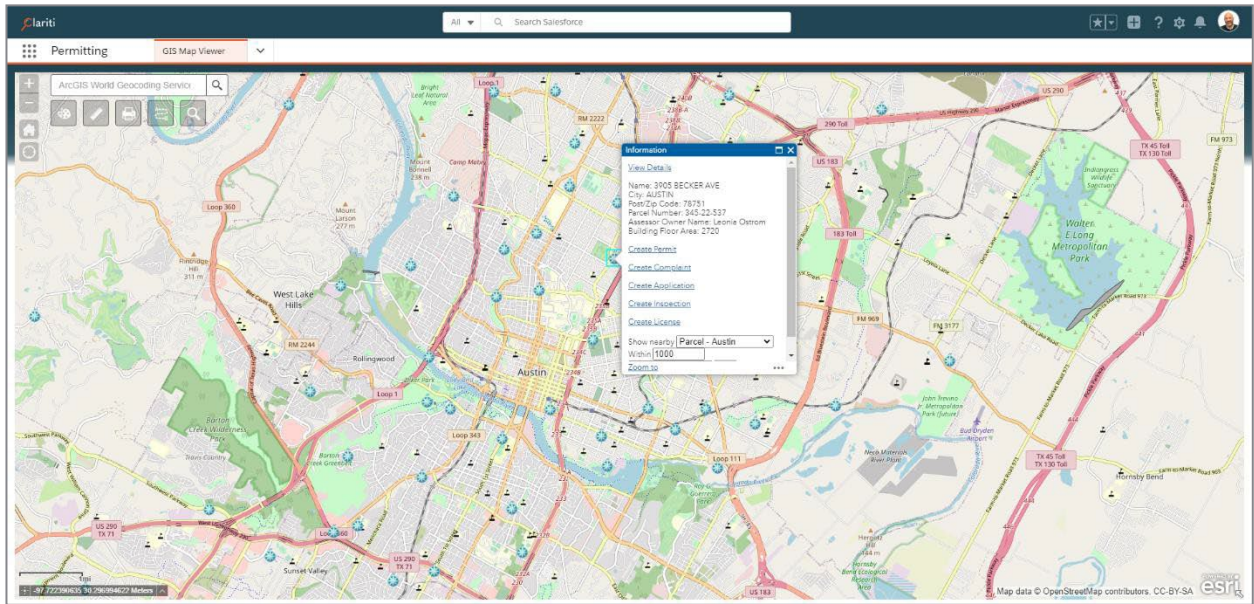
You can also share files with other users who can then track changes via the "Follow" function.

5.10 GIS

Clariti's ESRI Sync Tool integrates your existing ESRI-GIS Server spatial data with Clariti. It adds visual analysis capabilities to Clariti. Clariti's ESRI Sync tool reduces complexity by providing your staff with map-based tools to manage all land use, zoning, and relevant information related to a parcel, permit, inspection, plan, or code violation. Should the Town use a different GIS system, the Salesforce platform provides an industry-leading Web services API allowing integration to existing GIS solutions. Salesforce only needs access to a local or web-based instance of the GIS solution; no other software or hardware is needed.

Clariti's GIS capabilities allows users can filter layers, view search results, and click on a parcel to display options to view a record, add a permit or complaint, and other options. Below is an example of a GIS screen. In the images you will see show how to filter layers, view search results, and how clicking on a parcel will display options to view a record, add a permit or complaint, and other options.

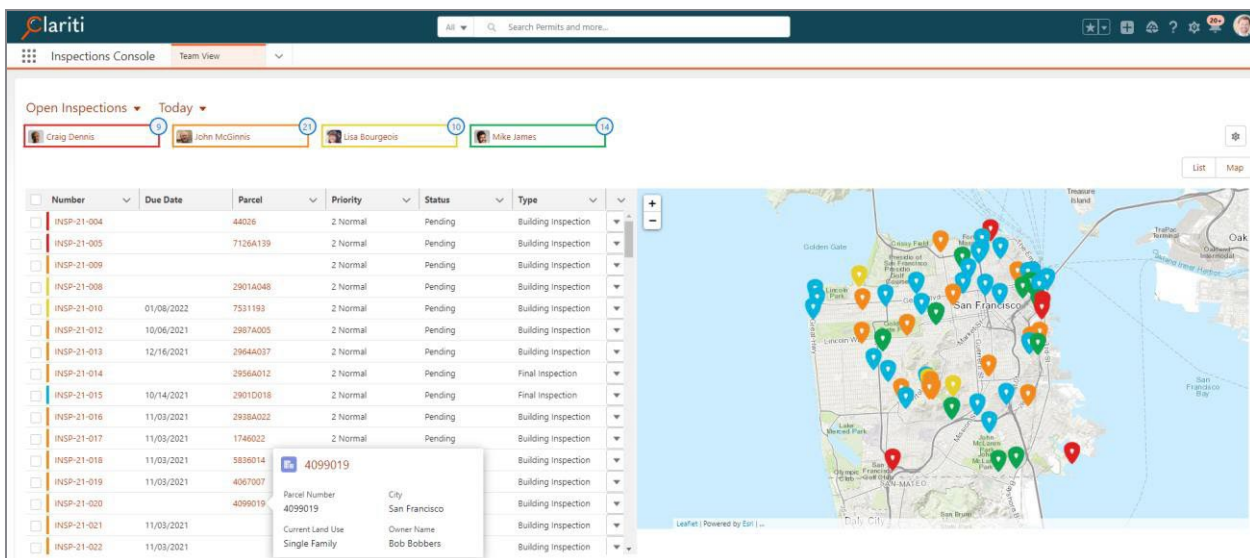




5.11 Inspection Management

Clariti is designed and architected for conducting fieldwork related to audits, inspections, investigations, and enforcement by staff. As a web-based application, our solution enables staff to take their work directly into the field by supporting on-site, real-time inspection, and other field verification activities.

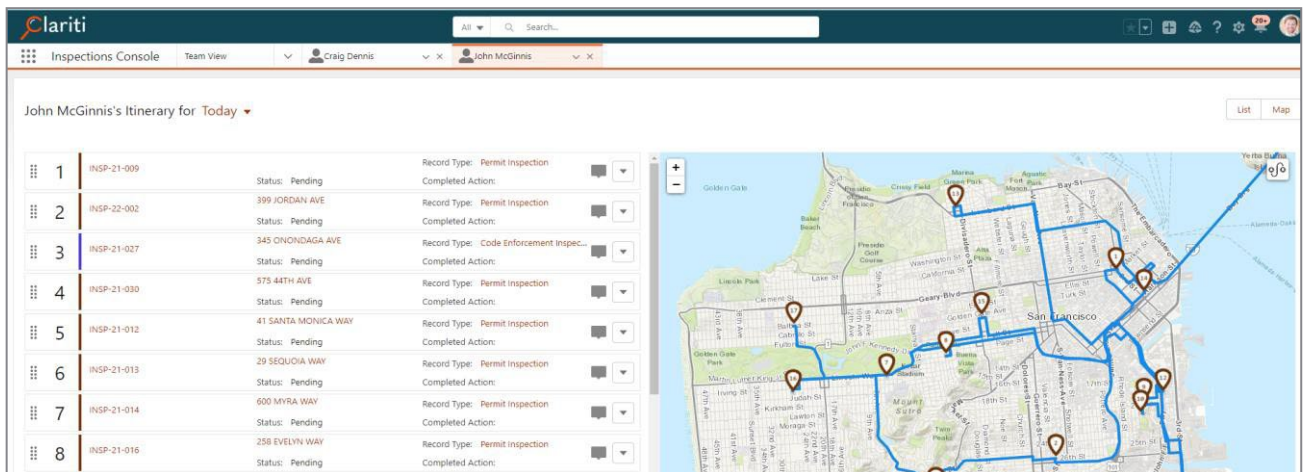
Inspection supervisors have the ability to manage the entire team of inspectors directly from the Team View interface (pictured below). The management function allows inspection supervisors the ability to see the current status of all inspections, the assignment across all inspectors, manage routing of inspections as well as mass assignment or reassignment of inspections.



Inspectors have the ability to access their daily itinerary, manage their route and even mass result inspections from one screen. Inspectors have access to all information

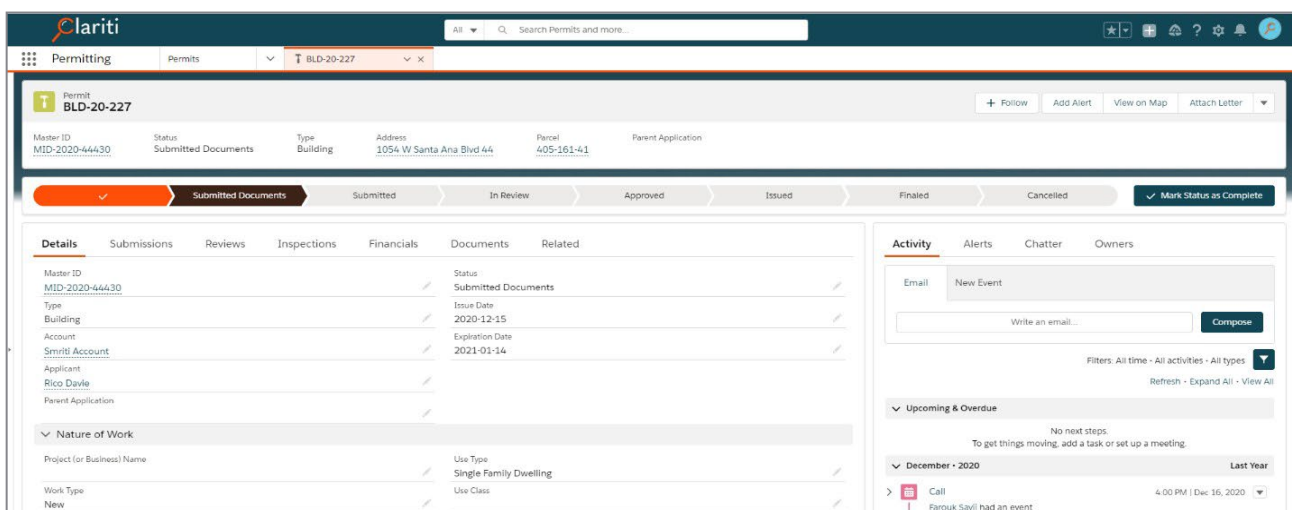


required when out in the field including all permit, enforcement, address, contact, application, complaint, etc. information without having to search for it.



5.12 Permitting

Permitting is also one of the foundational software components of Clariti. The Permitting console allows authorized staff users the ability to create new permit types (e.g. building, electrical, plumbing, etc.) and related submission requirements, inspections, fees, and workflow to manage development projects. Citizens can then apply for any number of those defined Permit Types in the system (e.g. electrical, plumbing, and environmental), and each permit type may have unique conditions or attributes associated with it. Unique attributes can include the fees associated with the Permit. For example, Plumbing fees may be calculated on the number of fixtures or 'work items' used in the project, or the fee may be a flat rate or calculated based on the estimated value of the permit activity. Additional permit workflow may require other conditions to be met as part of the application process, which could include providing submission documents such as plans, contractor licenses, or any other required documentation.



Clariti workflows let you manage and automate application submittals, application fees, sending batch print processes to printers and other advanced workflows where cross



object, conditional, and dynamic workflows are required. The flows engine also allows the scheduling of fee changes and ordering of rules that have priority over other rules. For every business rule created, one or more workflow actions may be created that are executed when the workflow rule fires. Workflow can extend across multiple departments and even trigger actions within other systems. Standard workflow rules support four different action types: Tasks, Field Updates, Emails Alerts, and Outbound Messages.

In addition, business rules can be configured in to address exactly all application processing, review, approvals, fees, submissions, checklists, inspections, complaints, violations, termination needs within an agency. The flows engine is rules-based and therefore capable of configuration to exactly mimic business rules from case type to case type and within different types of cases (e.g., company licenses, individual licenses, facility licenses, etc.).

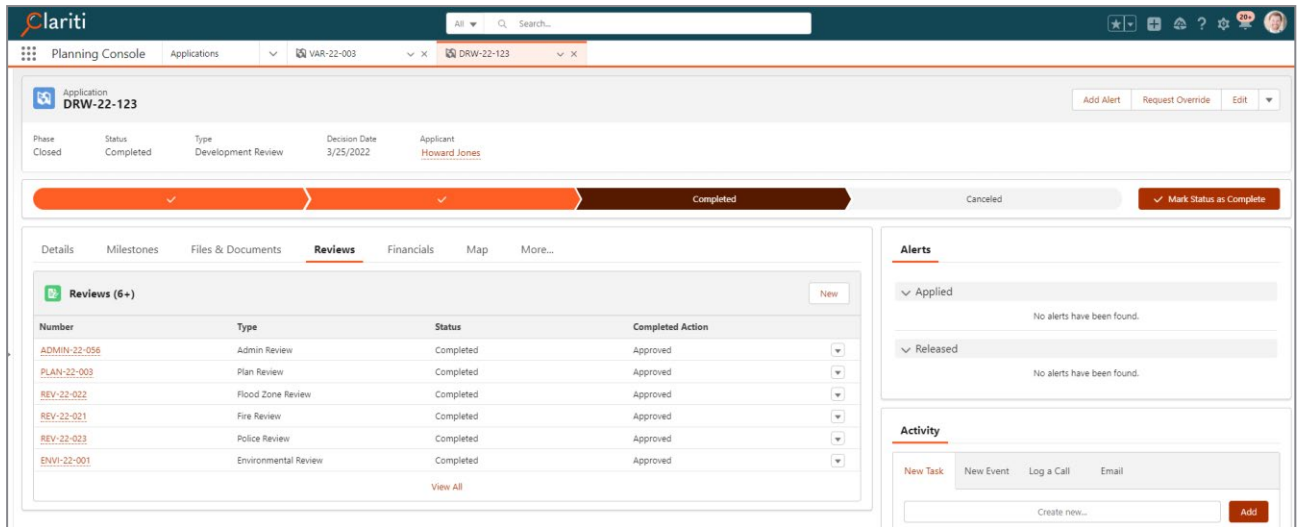
The system also allows the triggering of events in other areas of the application suite. A successful permit application may trigger the creation of an Inspection record. A plumbing or electrical permit often will require an onsite inspection to validate that the work performed is up to code. It is important to note the Clariti system also allows Codes/Ordinances to be imported into the database and be referenced as part of an inspection / violation process. This forms part of the Compliance capabilities of the Clariti suite. Ongoing monitoring can be configured within the system and may last for the duration of a permit or extend well beyond a permit period.

5.13 Planning and Zoning

The Clariti solution offers a complete Planning module for managing planning functions. The example below shows the addition of a project, in the form of a multi-picklist. The types of projects available and the information required for each of those projects are configurable to each client's needs.

Within the project, staff can manage the location of the project (in this case a parcel from GIS). They can manage different reviews against the overall project. Within reviews, staff can manage specific tasks/activities on the review (with color coding for status).





Staff can also manage applications specific to the overall project. And within each application, staff can manage individual reviews of each application within the overall project, and individual fees within each application attached to the overall project.

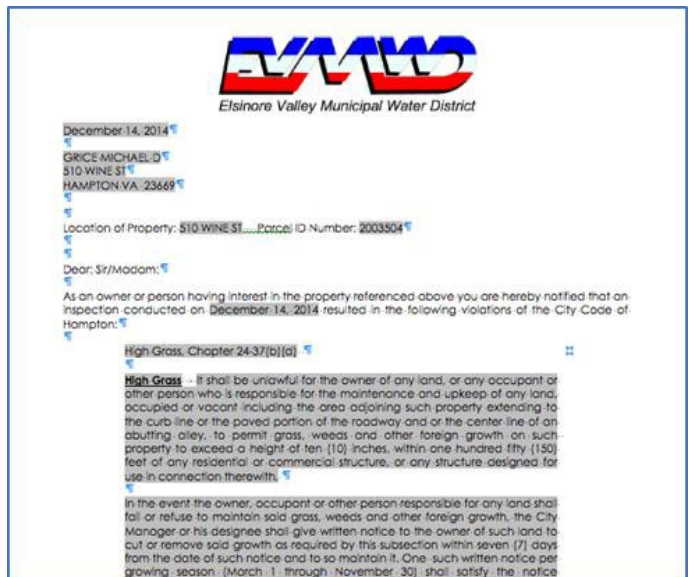
5.14 Letters Engine

Clariti's Letters Engine allows for documents currently used by the client to be imported into the system. The Letters Engine reads standard merge fields in the system to populate the letters with record information. This allows the system to auto-generate letters with information from applications to create any kind of document or letter – all with minimal interaction from the staff.

Letters can be auto-generated with information from Clariti/Salesforce records to create the City-specific documents. The system can be loaded

with branded letter templates that can also be "batch" printed. The mail merge process supports generating form letters and other Microsoft Word documents that are personalized for the recipient.

Documents can also be auto generated based on status changes (such as order issued), or in a batch process, which is more common to renewals. Whenever a document is generated, it is attached to the record and can be viewed at any time and emailed from the system.



5.14.1 Emails

In addition, once the user has entered customer information, they can easily send mass emails to their contacts while making them look personalized, without having to re-enter information. Agency staff can save time while creating professional-looking emails and letters that can be pre-populated with application data. The system can also be easily configured to automatically, based on status changes. For example, once the status of a License application is changed to issued, the system can automatically generate a License Certificate and email it to the applicant.

If a user creates a custom letter not in the system, they can upload the letter so that it is part of the permanent record.

5.14.2 Multiple Formats

Documents can be formatted to fit into envelope windows to reduce envelope labeling. The Letters Engine has a directory showing all available letters, the letter output type, and who was responsible for the last modification.

The service supports a variety of file types. Often, generated documents are saved as PDFs to prevent editing. For other letters such as decision letters, the output is generated in a MS Word format that can be modified by the users if needed.

5.15 Analytics and Reporting

The Clariti system is designed to make it easy for clients to develop their own queries, analytics, dashboards, and ad hoc reports using Report Builder.

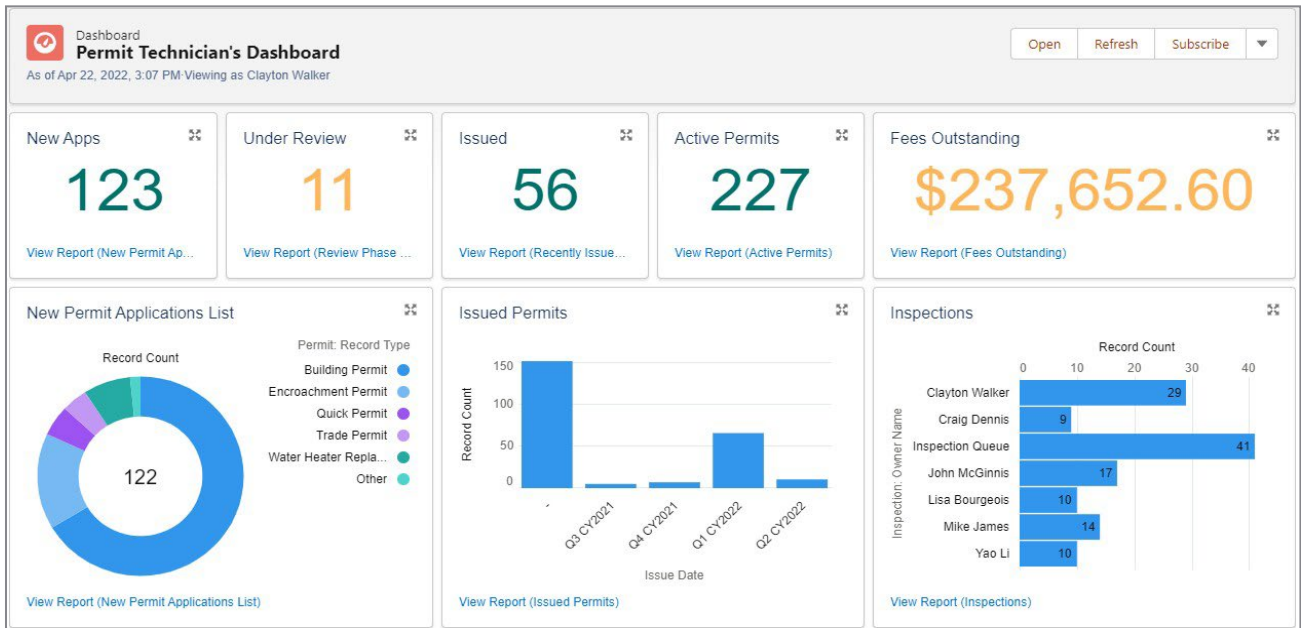
Clariti applications provide unparalleled data access through the built in-reporting functionality available in the platform. The platform provides the ability to generate ad-hoc reports on the fly using an easy-to-use report configuration wizard.

The Report Builder turns agency data into navigable and usable information that can be presented in easy to use drill down, interactive, and graphical displays. Ad hoc queries can be created as views or as reports. Views can be saved for re-use from a dropdown list of available views without the use of the Report Builder.

The Clariti Report Builder and Dashboards provides drag and drop functionality to allow users to run saved reports or define new reports and filters to create ad-hoc queries.

Users in authorized roles can maintain reports and save as templates to folders. Other system users are granted access to report folders through security profiles and can use the saved templates (which include columns and filters) to run reports.





Authorized users can edit existing reports and save the updated templates to folders for other system users to access. In addition to editing a template, authorized users may also clone a report template to make another version of the template and then update the design to create a new template.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: Daily **Weekly** Monthly

Days: Sun Mon Tue Wed Thu **Fri** Sat

Time: 3:00 PM

Recipients

Receive new results by email when dashboard is refreshed. ⓘ

Send email to: Me, John McGinnis

[Edit Recipients](#)

[Cancel](#) [Save](#)

Reports can be scheduled, and the output emailed to a valid Salesforce user as a .csv or .xls file.



5.16 Clariti Payments:

Clariti has partnered with Paysafe, an industry leading payment processor in North America, to offer a best in class and fully PCI-compliant payment solution, Clariti Payments. Clariti Payments enables you to accept online payments through the Clariti Citizen Portal and back-office payments through the embedded Virtual Terminal, making it easy for your citizens to pay their bills.

With our Payments solution, you can:

Accept Multiple Payment Methods With Clariti Payments, you can accept credit card, debit card, and ACH/EFT payments. Unlike many other payment gateways that only accept credit cards, you get to define the payment methods you want, and provide the flexibility your customers seek.

Seamless Portal Integration Clariti Payments makes it easy for customers to make a payment via your Community Portal, and for back-office payments to flow smoothly using the embedded Virtual Terminal.

Refund and Void Clariti Payments leverages already established functionality within Clariti Financials to initiate voids or refunds of any payments that were processed through Payments. This integrated functionality removes the need to manually perform the refund/void in each system (Clariti and Paysafe) and eliminates the potential for human error.

Reporting Gain detailed visibility into any processed transaction, including the current status, , and access reports that cover transaction settlement, refunds, chargebacks, and more.

Pre-configured and Ready for Use No need to manage a long, expensive payment processor integration. Clariti Payments comes pre-configured so that you can begin taking payments in moments not months.



5.17 Clariti Guide:

Permit Guide

To help you drive consistency and reduce mistakes by applicants, our proposed solution includes the Permit Guide. This guide can be added to your portal and organizes all the rules, regulations, and instructions in one easy-to-access location. Additionally, the guide automatically provides every applicant with a list of the required forms, fees, and documents, streamlining the process for everyone involved. By using the Permit Guide, applicants are more likely to submit a correct application on their first try, cutting down on calls, emails, and counter visits for your staff. This value-added tool can help your community plan their development projects correctly.

How it works

STEP ONE



Enter details about your project by going through our smart questionnaire

STEP TWO



Select a location to check zoning and other parcel-based details

STEP THREE



Receive a uniquely customized set of instructions for how to get your project done

Key Highlights

- Answer questions like “Which permits do I need?” and “Can I build this at this address?”
- Quickly provide estimates for fees and approval timelines
- Automatically perform zoning checks
- Flag properties in hazard areas, like flood zones, fire hazard areas, or near a coastline
- Easily import content and rules from other agencies around the Country
- Intuitive visual rules engine to configure the guide – no coding required



The permit guide takes extensive permitting processes and shows customers step-by-step what they will need to do in your system, providing information up front to avoid surprises or questions later.

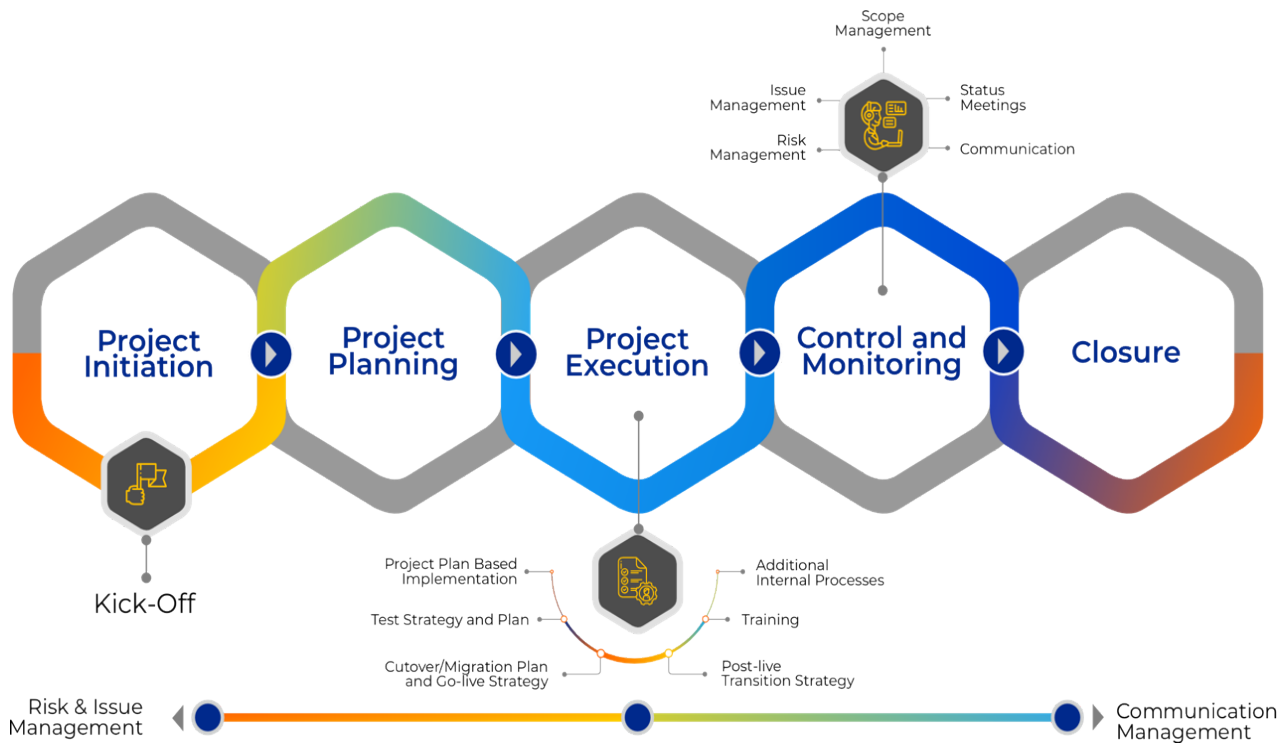


6. Project Management & Delivery

6.1 Speridian Project Management Approach

Speridian project planning adheres to tried and true methods and procedures that we have applied to hundreds of successful projects and will assure that the project meets **City of Palm Desert** requirements on time and within budget.

The following areas represent the critical project management elements and how we plan to approach each aspect of this project.



6.2 Project Governance and Communication

Speridian's Project Manager will work in conjunction with the **City of Palm Desert's** Project Manager and Project Sponsor to facilitate the project governance and management activities outlined in this approach.



6.3 Project Management

Speridian will assign a project manager to oversee this project, ensuring standard project controls, including:

- A central repository for documentation
- Project budget
- Project schedule
- Issues tracking tool
- Risk tracking tool
- Weekly status meetings
- Immediate communication to the client of any potential risks, scope changes, or concerns

The Project will be managed using formal project management methodologies consistent with the Project Management Body of Knowledge (PMBOK) framework.

The following is a brief overview of project plan's phases and the tasks that will be performed to manage the Project:

6.3.1 Project Initiation

- Facilitate Project Kick-Off Meeting to confirm scope, deliverables, and timeline
- Establish Project objective and success criteria
- Identify all assumptions, dependencies, and constraints
- Establish governance for the Project and teams

6.3.2 Project Planning

- Perform stakeholder analysis and establish Communication Plan to be executed throughout the Project
- Identify all site readiness items/tasks
- Work with technical team(s) to establish an approved detailed Project Plan/Schedule
- Confirm Change Management Procedures (if applicable)
- Define transition/on-going support strategy Project Execution
- Drive and manage implementation efforts per established Project Plan
- Define Test Strategy and establish a Test Plan
- Execute all testing effort defined in the Test Plan
- Define and execute Cutover/ Migration Plan and Go-live strategy
- Execute post-live transition strategy
- Execute planned training (if applicable)
- Execute any additional required internal processes

The Speridian Project Manager will be responsible for the overall project and coordination of project management activities with **City of Palm Desert's** Project Manager.

The Project Manager will be responsible for coordinating all engagement activities and scheduling resources as well as for serving as the single point of contact for Speridian and the City of Palm Desert for this engagement.



6.3.3 Control and Monitoring

- Risk Management – Identify and manage risks and execute all established mitigation plans
- Issue Management – Identify, record, and facilitate resolution of all issues
- Scope Management – Monitor scope creep and identify, record, and execute any required change request(s)
- Conduct weekly status meetings and deliver communication on status to project stakeholders
- Communicate all aspects of project work as defined in the communication plan
- Closure
- Complete Lessons Learned with the Team
- Obtain final sign-off (Certificate of Completion)

6.3.4 Issue/Risk Management Procedure

The following procedure will be used to manage active project issues and risks during the project:

- Identify: Identify and document project issues (current problems) and risks (potential events that impact the project)
- Analyze & Prioritize: Assess the impact and determine the highest priority risks and issues that will be managed actively
- Plan & Schedule: Decide how high-priority risks are to be managed and assign responsibility for risk management and issue resolution
- Track & Report: Monitor and report the status of risks and issues and communicate issue resolutions
- Control: Review the effectiveness of the risk and issue management actions

Active issues and risks will be monitored and reassessed on a weekly basis. Mutually agreed upon issue escalation and risk management processes will be defined at the outset of the project.



6.3.5 Communication Plan

Effective communication represents one of the most crucial success factors for any project. Communication management starts early in the project during the project-planning phase with focus on identifying the stakeholders and documenting their communication needs in the communication management plan.

The Speridian project manager will perform stakeholder analysis as mentioned in the project planning phase to establish the basis for the communication plan.

Speridian can communicate with City of Palm Desert stakeholders using any of the following typical avenues.

The Speridian Project Manager will be the primary contact for all communication with the City. The Project Manager interacts with the client team and also acts as the liaison between the client and Speridian's team. Likewise, it is expected that the City will also identify one person as the interface with Speridian. In addition, Speridian will clearly identify the escalation path that the City can use to resolve any discontent. The project communication activities plans are listed below.

- Formal and informal face to face meetings
- Weekly project communication - combination of status reports and conference calls
- Daily email contact
- Phone
- Web meetings



6.4 Project deliverables

Speridian will deliver the following plans as part of final delivery of project.

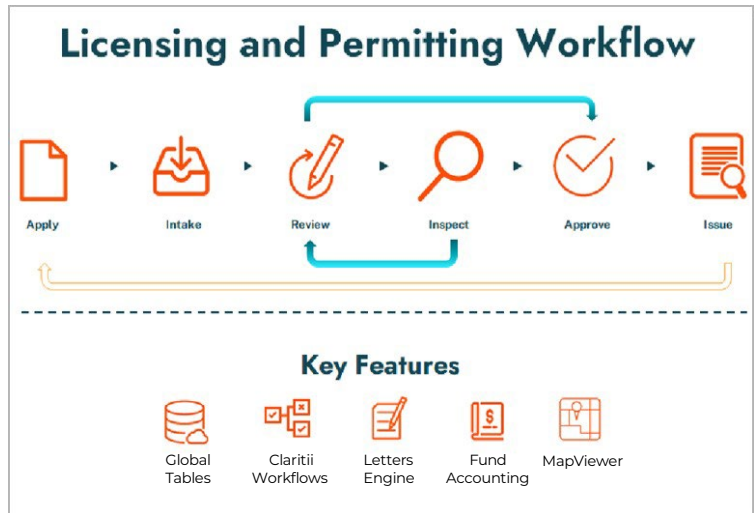
ID	Deliverable Name	Description
CoPD-DEL-01	Project Plan Document	Describes the detailed work breakdown schedule for the LMS implementation
CoPD-DEL-02	Project Status Reports	Describes the weekly status of the project with information regarding activities completed, activities scheduled, issues, risks, etc
CoPD-DEL-03	Business Requirements Document	A document describing the detailed base product features and gaps identified to be implemented as output of the Discovery Phase
CoPD-DEL-04	Functional Design Document	A document illustrating with annotations of the base product features and gaps identified to be implemented as output of the Discovery Phase
CoPD-DEL-05	Interface Control Document	A document describing the detailed interface/integration requirements and design of the Clariti components with CoPD's systems needed for the implementation.
CoPD-DEL-06	Data Migration Document	A document describing all data that are to be migrated, including all sources files and systems, and the associated mapping to Clariti objects.
CoPD-DEL-07	Solution Testing Document	A document describing the approach, strategy, and test scripts for all requirements approved for Palm Desert's Clariti LMS implementation
CoPD-DEL-08	Training Materials	A detailed document describing all steps required to complete the core use cases that are required to use the new Clariti LMS solution
CoPD-DEL-09	User Acceptance Completion	A point in time during the testing phase when all developed code is tested by Speridian and Palm Desert IT in non-production environment or sandbox
CoPD-DEL-10	Checkpoint Signoff Document	A document certifying the readiness covering all steps necessary to successfully deploy the Clariti LMS solution to Production
CoPD-DEL-11	Production Deployment Signoff	A point in time during the Deployment phase where the new Clariti LMS solution is promoted to Production



7. Implementation Methodology

As a result of successfully implementing and deploying over 100 enterprise software implementations, Speridian has created, and continually improves upon, our proven Implementation Methodology, and is derived from proven techniques, “Best Practices,” and lessons learned developed through years of experience and industry standards put forth by the Project Management Institute® (PMI) that is used to achieve timely implementations with minimum operational disruption.

Speridian’s role as a Systems Integrator will be to configure the Clariti solution to the specific requirements of the City around its licensing, inspection management, permitting and enforcement processes.



We understand that each organization is unique but follow a general pattern in permitting and licensing (as seen in its simplest form below):



Speridian is a CMMI Level-5, ISO 9001:2008, ISO/IEC 27001:2005 technology company with a business focus, driven to deliver excellence through technology-fueled innovation. Continuous quality is infused into everything we do - both internally and with our partners and clients.

As a result of successfully implementing and deploying over 100 software projects, Speridian has created, and continually improves upon, our proven Project Management Methodology, and is derived from proven techniques, “Best Practices,” and lessons learned and refined through years of experience and industry standards put forth by the Project Management Institute® (PMI).



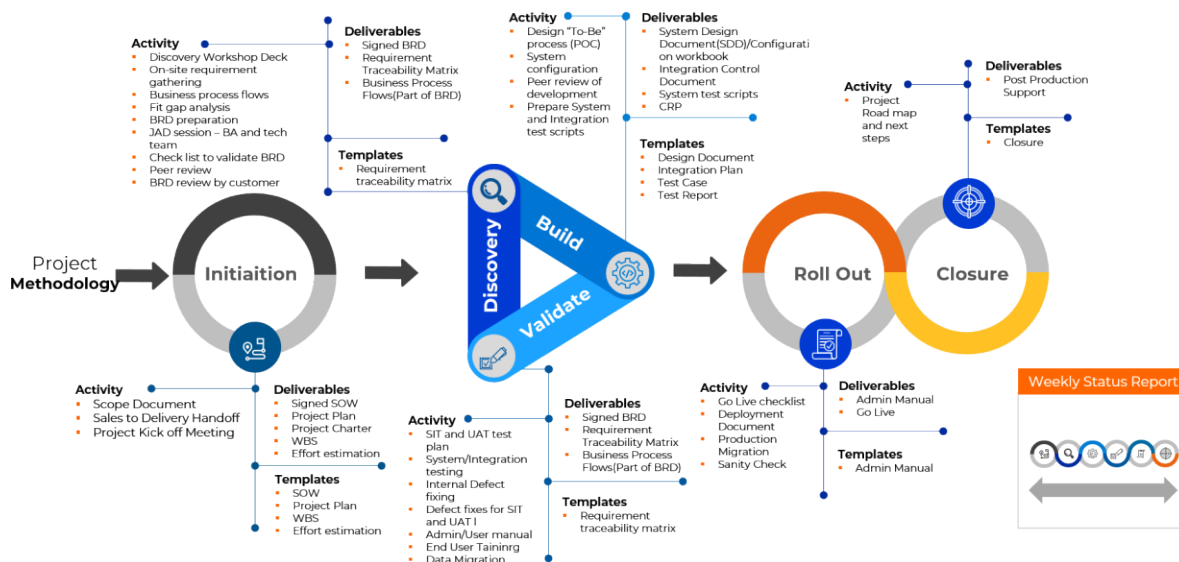
Driven by our aspiration to adopt Software Engineering Institute management standards, Speridian’s Project Management Methodology has been designed to comply with software Capability Maturity Model Level 5 goals.

By blending the latest technologies with the best industry standards, our Project Management Methodology has been designed with Client and Quality as our primary focus areas.

Speridian maintains an open-ended approach to its solution while using industry standard tools and methodologies to achieve best results. The methodology described below has been formulated keeping the based products in mind, where the implementation cycles are short and require a lot of agility while configuring/customizing the product.

7.1 Project Delivery Framework

Speridian’s Project Implementation and Roll Out Framework has been derived from proven techniques “Best Practices” developed through years of experience and industry standards put forth by the Project Management Institute® (PMI).



For this project, based on the technology, integrations, expected duration, mandatory phases and plans to be included, we propose to use a disciplined hybrid agile approach, composed by key practices of Extreme Programming, OpenUP, Lean Development and Scrum.

Driven by our aspiration to adopt Software Engineering Institute management standards, Speridian Project Management Methodology has been designed to comply with software Capability Maturity Model Level 5 goals.

Blending the latest technologies with the best industry standards, our Project Management Methodology has been designed with Client and Quality as our primary focus areas. Speridian maintains an open-ended approach to its solution while using industry standard tools and methodologies to achieve best results.

The methodology described below has been formulated keeping the Cloud based products in mind, where the implementation cycles are short and require a lot of agility while configuring/customizing the product.

7.1.1 Initiation

This is the initial phase of project management where the initial planning for the project starts. The initiation starts with a project Kick Off meeting between Speridian’s Sales & Delivery team and Customer’s stake holders. This sets the platform of initial introductions and detail planning of the next phases.

In Parallel the sales team hands off the project to the delivery team which would closely interact with the customer and work on identifying the resources for the project team, outlining the project management structure and control processes. This phase is executed in parallel to the launch of the project.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> • Scope Document • Sales to Delivery Handoff • Project Kick off Meeting 	<ul style="list-style-type: none"> • Signed SOW 	<ul style="list-style-type: none"> • SOW



7.1.2 Discovery

During this phase Speridian’s BAs and Solution Architects will interact with Client’s SMEs to gather requirements and build the process flows. Presenting the Standard deck/demo which will cover the functionalities of the application is done in this phase.

Conducting Fit-Gap analysis to identify the gaps is one critical activity done during the Discovery phase. Business Requirements Document (BRD) is prepared based on the requirement gathering done in this phase and the sign-off is done.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> Discovery Workshop Deck On-site requirement gathering Business process flows Fit gap analysis BRD preparation BRD review by customer 	<ul style="list-style-type: none"> Signed BRD 	<ul style="list-style-type: none"> Business Requirements Document

7.1.3 Build

Build Phase will include the implementation of key features which are the building block of the entire functionality. Build phase is iterative, which has the following stages: Configure &Customize, Unit test, Demonstrate and Fill Gaps. ‘To-be’ process is designed as a part of the Configuration. This is the phase where the System is configured based on the requirements. This phase would be multiple sprints depending on the scope and complexity. CRP sessions are conducted with customer after every sprint. Review of the code and Unit Testing are the other major activities that take place during the Build phase.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> Design “To-Be” process(POC) System configuration Peer review of development 	<ul style="list-style-type: none"> Unit Testing 	<ul style="list-style-type: none"> Functional and Technical Design Document Test Cases



7.1.4 Validate

Testing is carried out by project team before the solution is delivered to the customer, to ensure that the solution meets the BRD requirements. The testing will be an end-to-end regression testing of all test cases corresponding to the BRD.

The BRD, Design document are used to develop a Testing Plan. Test plan is prepared with the test design, test cases, and test data and with the test schedule. System Integration Testing is done during this phase. Defect fixes for SIT and UAT defects are provided during the Validate phase.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> SIT and UAT test plan System/Integration testing Internal Defect fixing Defect fixes for SIT and UAT I Admin/User manual End User Training Data Migration 	<ul style="list-style-type: none"> UAT Signoff 	<ul style="list-style-type: none"> User Training Manual Admin Training Manual

7.1.5 Roll-out

Roll-out is the phase when the goals of this project are accomplished, desired outcome is produced, and deliverables are accepted, so the project is ready for further realization and maintenance. It is an ending phase that embraces the timeframe between project completion and handover.

Deployment is another name of the project go-live phase. Production Migration takes place in this phase. A Go-Live checklist is prepared to ensure that the Roll-out is happening right.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> Go Live checklist Deployment Document Production Migration Sanity Check 	<ul style="list-style-type: none"> Go Live 	<ul style="list-style-type: none"> Deployment Checklist



7.1.6 Closure

This is the final phase of the project management, which comes after all the project deliverables have been accepted by the client and the project is 'rolled-out'. This phase ensures that all projects close out activities like summarizing the project details and metrics collected, documenting the accomplishments and lessons learnt, updating relevant organization databases, closing any open issues, etc. have been accomplished as per defined processes. A discussion with the customer on the next steps is one of the key activities of this phase and it lays down a platform for the future engagement and support.

Activity	Deliverables	Templates
<ul style="list-style-type: none"> Project Road map and next steps 	<ul style="list-style-type: none"> Post-Production Support 	



8. Data Conversion Approach

8.1 Data Conversion Methodology

Speridian has vast experience in doing massive data conversions and migration projects especially in such similar implementations. Almost all implementations that Speridian delivered involved data conversion from legacy systems. From these experiences Speridian has developed an end-to-end data migration methodology that incorporates best practices, tools and accelerators to migrate or convert data from Legacy system(s) or source(s) to a desired target system. Major milestones involved within this process includes:

- Data Conversion Plan.
- Identification of data sources, entities and elements that need to be converted.
- Mapping of data from source to destination.
- Data extraction and Staging.
- Data profiling and Massaging.
- Data cleansing and de-duplication (Optional but strongly suggested).
- Exception Reports for manual data corrections.
- System testing.

Data Conversion Plan - The detail plan involved in data conversion will be articulated during this exercise. Please note that the process of finalizing this plan will be undertaken during the initial stages of the project implementation. The main items within this plan include:

- High level Conversion Strategy.
- Identify high level entities for conversion.
- Identify the scope of conversion for each entity.
- Identify conversion dependencies.
- Iterations planning.
- Environment plan.
- System test plan.
- Final Cutover Plan.

Identification of Data Sources, Entities and Elements - Iterative work sessions with state subject matter experts and data stewards will be required to fully understand the existing data model of all data sources needing to be migrated over into the new system.

This exercise facilitates environment planning and helps in understanding number of recommended iterations required to convert the data. It also gives a high-level estimation of the level of data cleansing, profiling and mapping effort required. The source data entities and elements in the mapping sheet will be covered in this step.

Mapping of Data from Source to Destination - Source data entities and elements identified in the above step will be mapped to the target solution in this step. Relationships between data elements in source and target systems are key drivers for the transformation process. Data Mapping will be performed on an entity to entity mapping level.



The following are high level activities involved in this exercise.

- Based on the information from Data Mapping document, create a detailed staging Data Model diagram.
- Create Data Mapping document that explains data mapping from source to staging area and from staging area to target system.

Data Extraction and Staging - Design and develop data extraction scripts to extract from the source database to the staging area is implemented during the mapping exercise. Staging area schema will be built from the staging area data model developed from the step above. Any exclusion logic that is identified during the data migration plan will be incorporated in this design. Extraction and load scripts will be developed, and unit tested on an entity-to-entity basis.

Data Profiling and Massaging - Our data conversion process is integrated with a proven data preparation process that includes automated data analysis (profiling), source to target mapping, and data cleansing that can improve data quality and reduce ETL timelines by as much as 35-50%. Data is also profiled at this stage to eliminate redundancies and to build a consistent and stable data in the staging area. This involves data type validations, length, discrete values, uniqueness, occurrence of null values, typical string patterns values, misspelling, missing values, varying value representation etc. Corrective actions will be taken in the staging area for these patterns discovered. Some might be technical corrections, and some may need collaborative work between the conversion team and data stewards.

Data Cleansing - Our data conversion process is integrated with a proven data preparation process that includes automated data analysis (profiling), source to target mapping, and data cleansing that can improve data quality and reduce ETL timelines by as much as 35-50%. We use a comprehensive set of advanced, automated and proven high-performance software tools (ODI, MDM, PLSQL, SQL, EDQ) for the process.

Load to Target - This step involves loading the cleansed and standardized data from the staging area to the target data model. The data is loaded to the tables in the target schema.

Exception Reports for Manual Data Corrections - All the exceptions that happen during the conversion process will be identified and reported. These records or entities may need manual correction from the business users or data stewards. Data profiling and massaging procedures will be refined to possibly avoid these types of exceptions.

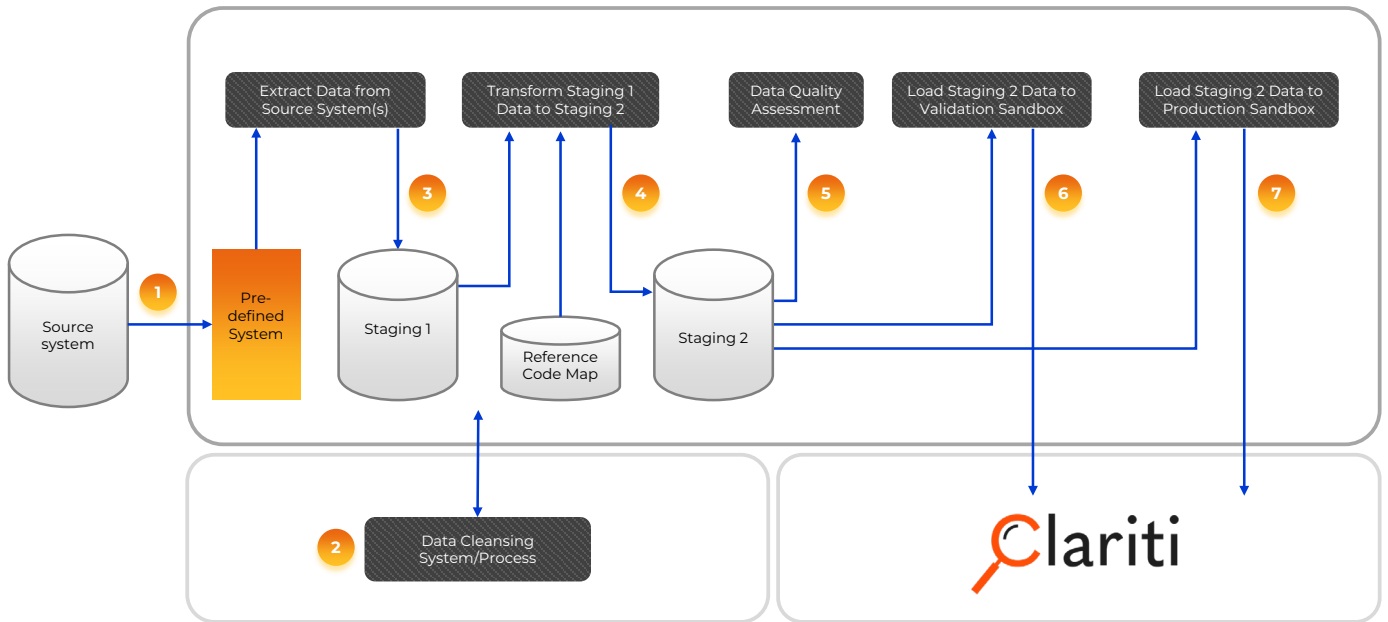
System Testing - Multiple levels of testing will occur throughout the project. Starting from unit testing, the data extraction, transformation and load scripts are unit tested, verifying the COTs configurations. IE functionalities are verified with converted data as well prior to cutover to production.

An optimization phase will follow each testing effort during the development and most of the system integration tests to verify optimization of the scripts, configuration and IE data model (indexes etc.)

Data Conversation and Final Cutover - Cutover is a critical activity where all client users are switched over to the new system. The final conversion activity will occur right after cutover, typically shortly before the go-live date.



8.2 Data Conversion Architecture:



Stage	Summary	Associated Migration Task	Owner
1	Data is extracted from the Source System(s)	List of Source System(s) tables in scope for data Migration. Data will be extract 1:1 without any transformation.	ETL Team, Source System(s) Business and Tech Team
2	(optional) Account data is cleansed and de-duplicated in a special-purpose data cleansing process	NA	NA
3	Each source system extract is loaded into a separate table in a relational database.	Create tables in staging 1 database/schema. Number of tables 1:1 in scope for migration. Definition of tables mirrors Source System(s).	ETL Team
		Advise on the transformation rules, process, and criteria to deliver the data in a manner that is will allow it to align with the future state.	SF DA, Source System(s) Business and Tech Team
		Create data mapping config workbook for ETL jobs with Source System(s) columns, where conditions, attributes, Standardization, Transformation, Metadata definitions, Usage, and Mapping	SF DA, Source System(s) Business and Tech Team, ETL Team, Data Gov
4	The data in the Staging 1 tables is transformed using ETL and stored in the Staging 2 tables.	Create tables in staging 2 database/schema. Number of tables 1:1 in scope for migration to Salesforce org. Definition of tables mirrors salesforce object with existing/additional fields.	ETL Team
		Reference code (picklist) mappings are read from a table (optional).	ETL Team
		Additional logic to transform or enrich the data standardization, transformation is implemented in this step of processing as well	ETL Team
		Link parent - child objects using lookup fields on dependent objects, IDs of rows loaded into parent objects in Salesforce are retrieved before loading dependent/child objects.	ETL Team
5	Reports or queries are run on the Staging 2 data to identify any data quality issues.	Technical data validation - source vs target row count, ownership count, historical dates	SF DA, ETL Team
		Reports are run on the Staging 2 data storing Salesforce objects to identify any data quality issues.	Business Team
		If any are found, data cleanup on the source system may be done before proceeding to step 6. Steps 1-5 could be run repeatedly before step 6 is run for the first time.	ETL Team
6	ETL loads data from the Staging 2 tables into a sandbox that mirrors the configuration of the Production Salesforce org.	Technical data validation - source vs target row count, ownership count, historical dates	SF DA, ETL Team
		Business users will perform usability and functional testing on the data in this environment before a load to Production Salesforce is done.	Business Team
		Integration testing with migrated data	Testing
		Objects are loaded in a sequence based on dependencies (e.g., Accounts, then Contacts). Lookup fields on dependent objects, IDs of rows loaded into Parent objects in Salesforce are retrieved before loading dependent/child objects.	ETL Team
7	The final step is loading to Production Salesforce. ETL is used to once again read data from the Staging 2 tables and load into Production Salesforce.	Track data load time per object to plan for production load	ETL Team
		Final production load	ETL Team
		Technical data validation - source vs target row count, ownership count, historical dates	SF DA, ETL Team



9. Training



As part of this proposal, Speridian will provide a ‘Super User’ training. The training will be conducted on-site and divided into two parts.

1. User Training
2. Admin Training

Super Users: Super Users are defined as Client’s stake holders who will own the application on day-today basis. The key responsibilities of a Super User include

- Thoroughly understanding the application functionality.
- Thoroughly understanding different user profiles and the access controls applicable to each of them.
- Training the end users on how to use the application based on their roles and responsibilities.
- Resolving end user basic queries.
- Understanding the administrative capabilities of the system.
- Performing the day-today basic administration of the application



Training component details are described below

1. User Training

- Process Walk Through: Speridian will walk the Super Users through the different functional processes built within the system. This will be done via a presentation.
- Supervisor Training: Here the Super Users will be trained on the tasks that a supervisor should perform within the system to efficiently run his team.
- Management Training: The Super Users will be explained on how the management can use the system to track the overall progress of the department/Organization.
- Dos & Don'ts: Super User will be briefed about the dos and don'ts for a Super User and other profiles created within the system. This will be with respect to the functional processes.

2. Admin Training

- Administrative Concepts: Speridian will explain the Super User the concepts of the application administration. This will help the Super User understand the extent to which they can administer and maintain the application without Speridian's help.
- Profile Management: One of the key administrative tasks for the Super User would be to manage the profiles and access controls based on the profiles. Speridian will train the Super User on how to add & modify these profiles.
- User Management: The other key tasks is to add & remove users. If a new user is added, then associate the right profile with the user. Post admin training, the super user will be able to perform this task.
- Application Administration: The other administrative tasks within the purview of Super User's responsibility will be explained.
- Dos & Don'ts: Super User will be briefed about the administrative dos and don'ts.

Our training plans are agile and are designed to meet the City's expectations. During our training planning session, a thorough assessment of the audience, their technical skill level, experience using similar solutions etc. are taken into consideration when deciding the Training batches or groups to ensure the message is reached to everyone who is part of the training.

Speridian's Certified Trainers have comprehensive experience delivering training programs in Online mode as well as Classroom mode. One of the highly appreciated benefits of our Online training sessions are the Training Video Recordings shared with the Clients, which the Client can leverage in training more resources or future references.



12.1 Training Deliverables

- As part of the proposed training plan, following would be the Training Deliverables:



- The training materials shared are designed in such a way that they are easy and simple to understand for users of any levels of Technical skills.
- By referring the Videos and Screenshots with step by step guidance provided as part of the training materials ensures a successful completion of the Hands-on application for the Trainees.
- Roleplays and 'A Day in Your Life' scenarios are some of the most successful techniques used by our trainers in training the users and admins.
- Training feedback and reviews are collected after every session to ensure continuous improvement in our training methodology



10. High-level Work Plan and Schedule

Task Name	302 days	Mon 1/8/24	Fri 2/28/25
City of Palm Desert - Clariti LMS Implementation	1 day	Mon 1/8/24	Mon 1/8/24
Kick-off	21 days	Mon 1/8/24	Thu 2/1/24
Discovery	7 days	Mon 1/8/24	Sun 1/14/24
Project Planning	5 days	Tue 1/9/24	Sat 1/13/24
Clariti Environment Setup	7 days	Sun 1/14/24	Mon 1/22/24
Data Conversion and Migration plan	7 days	Tue 1/23/24	Wed 1/31/24
Integrations plan	7 days	Mon 1/8/24	Sun 1/14/24
Analytics plan	7 days	Mon 1/15/24	Tue 1/23/24
Test plan	6 days	Wed 1/24/24	Wed 1/31/24
Configuration Management and Implementation plan	7 days	Mon 1/8/24	Sun 1/14/24
Organizational Change Management plan	7 days	Mon 1/15/24	Tue 1/23/24
Security plan	6 days	Wed 1/24/24	Wed 1/31/24
Training plan	7 days	Mon 1/15/24	Tue 1/23/24
Deployment plan	10 days	Fri 2/2/24	Thu 2/15/24
Sprint 0	195 days	Fri 2/16/24	Thu 11/14/24
Development Sprints	15 days	Fri 2/16/24	Thu 3/7/24
Sprint 1	15 days	Fri 3/8/24	Thu 3/28/24
Sprint 2	15 days	Fri 3/29/24	Thu 4/18/24
Sprint 3	15 days	Fri 4/19/24	Thu 5/9/24
Sprint 4	15 days	Fri 5/10/24	Thu 5/30/24
Sprint 5	15 days	Fri 5/31/24	Thu 6/20/24
Sprint 6	15 days	Fri 6/21/24	Thu 7/11/24
Sprint 7	15 days	Fri 7/12/24	Thu 8/1/24
Sprint 8	15 days	Fri 8/2/24	Thu 8/22/24
Sprint 9	15 days	Fri 8/23/24	Thu 9/12/24
Sprint 10	15 days	Fri 9/13/24	Thu 10/3/24
Sprint 11	15 days	Fri 10/4/24	Thu 10/24/24
Sprint 12	15 days	Fri 10/25/24	Thu 11/14/24
Sprint 13	27 days	Wed 10/30/24	Thu 12/5/24
Training	17 days	Wed 12/4/24	Thu 12/26/24
User Acceptance Testing	10 days	Fri 12/27/24	Thu 1/9/25
Revise Application Documentation	6 days	Fri 12/27/24	Fri 1/3/25
Deployment and Cutover Rehearsal	7 days	Mon 1/6/25	Tue 1/14/25
Release to Production	7 wks	Tue 1/14/25	Mon 3/3/25
Post Go-Live Warranty Support	4 days	Wed 2/26/25	Mon 3/3/25
Project Closure	14 days	Wed 2/12/25	Mon 3/3/25
Turnover	0 days	Mon 3/3/25	Mon 3/3/25
<i>Close project</i>	302 days	Mon 1/8/24	Fri 2/28/25

Note: The complete MS*Project Plan (.MPP) format will be provided separately.



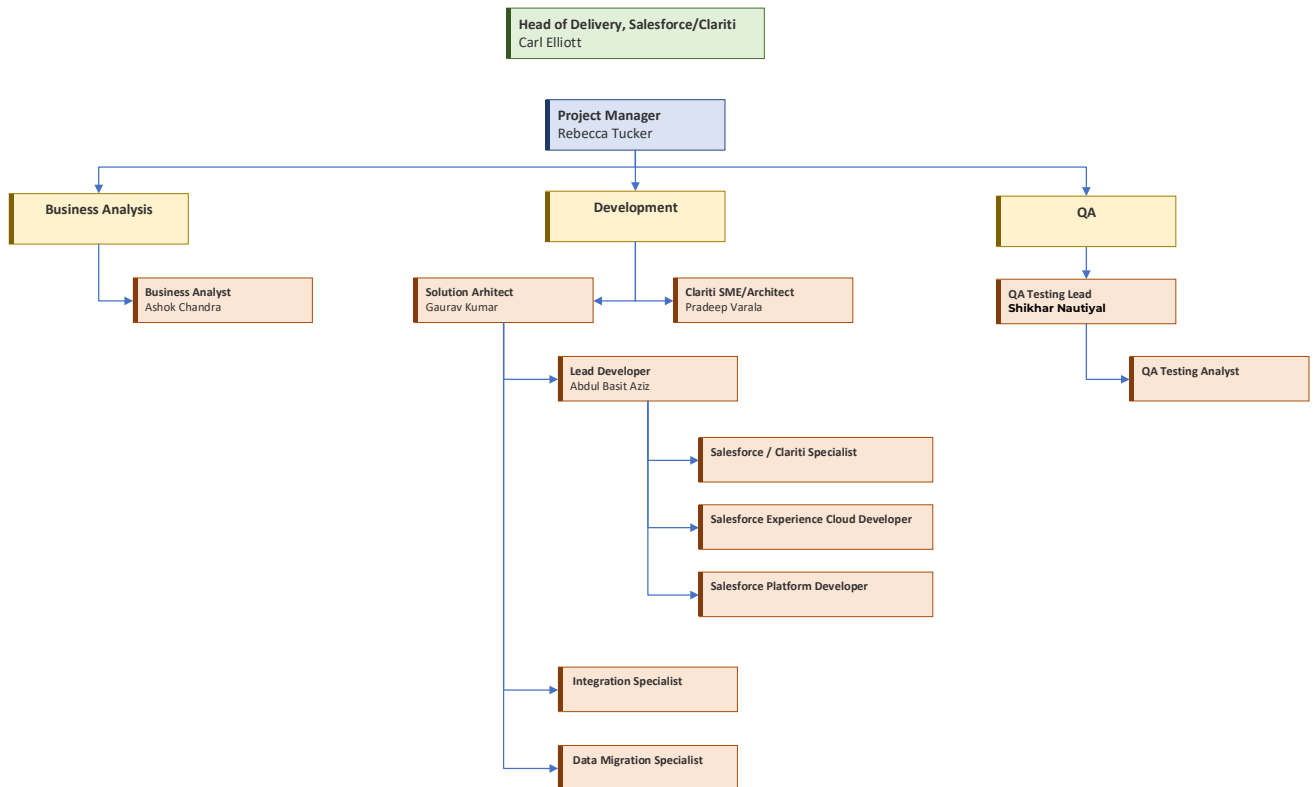
11. Project Timeline



12. Proposed Delivery Team

Speridian will assign a blended USA-based / offshore model where the key delivery roles will be based in the USA and the developer roles will be based offshore from our Licensing & Permitting Delivery Center to support this implementation of the Land Management solution for the City. This is a proven model that we have successfully adopted for cities like Bakersfield, Covina, CSD, San Marcos, etc.

Please find below our proposed implementation team structure with names of our proposed key personnel:



Key Personnel Roles and Activities

Speridian’s key personnel will provide the following tasks and activities for the project.

Role	Key Personnel	Tasks and Activities
Head of Delivery	Carl Elliott	<ul style="list-style-type: none"> Owns and delivers the operational budget for the vertical, including productivity, financial and resource planning, and operational goals Identify and deliver service improvement activity across the teams through employing process improvement methodologies and the application of innovative thinking Provides strategic level planning including resource planning, rate forecasting, and peak season planning Drives continuous improvement projects to optimize operations and improve productivity to meet and exceed business objectives; works on strategic projects that have total building and network-wide impact. Effectively leverages the operations managers to solicit ideas and understand problems and challenges Establishes objectives and metrics for quality, productivity, and customer experience Sets clear goals and expectations for client success managers. Measures performance, provides feedback, and holds leaders accountable
Project Manager	Rebecca Tucker	<ul style="list-style-type: none"> Demonstrate a working knowledge of project management principles, or certified as a Project Management Professional (PMP) and / or Agile certified Partner with the City to drive and advance project progress Perform stakeholder analysis Develop Project Plans Author Status reports Facilitate meetings, including providing an agenda, recording decisions, action items, and distributing meeting minutes Managing user-centric design and solution teams configuring Salesforce Create, facilitate input to annual legislative reports
Business Analyst	Ashok Chandra	<ul style="list-style-type: none"> Identify business and technical needs Deliver value-based solutions and recommendations Adaptive to different approaches and processes Ensure compliance with the City’s requirements regarding business analysis Collecting user-centric requirements, processes, and key artefacts using an Agile delivery model
Solution Architect	Gaurav Kumar	<ul style="list-style-type: none"> Architect cloud-based Software as a Service (“SaaS”) Responsible for the creation, maintenance and management of cloud architecture and lower-level components. Interpret, use and apply information contained within cloud architecture to inform a range of business improvement activities, particularly those involved in the design, development, enhancement and maintenance of cloud support systems. Architecting and development of scalable, secure and integrated solution on the Salesforce platform Monitor and ensure architectural quality attributes for performance, scalability and sustainability



<p>Clariti Architect</p>	<p>Pradeep Varala</p>	<ul style="list-style-type: none"> ▪ Provide expertise working with the Clariti product to enhance and implement the solution ▪ Recommends and participates in activities related to the design, development and maintenance of the Enterprise Architecture (EA). ▪ Shares and communicates best practices, lessons learned and constantly updates the technical system architecture requirements based on changing technologies, and knowledge related to recent, current and up-coming vendor products and solutions ▪ Support Speridian in defining the solution to best support client and Speridian on the Clariti/Salesforce platform. ▪ Address questions related to the product and how the product can support the solution, assist with translating requirements into the solution, and ensure the client is receiving the full functionality of Clariti Provide expertise working with the Clariti product to enhance and implement the solution ▪ Recommend and participate in activities related to the design, development and maintenance of the Enterprise Architecture (EA). ▪ Shares and communicate best practices, lessons learned and constantly updates the technical system architecture requirements based on changing technologies, and knowledge related to recent, current and up-coming vendor products and solutions ▪ Conduct code review and quality assurance reviews
<p>QA Lead</p>	<p>Shikhar Nautiyal</p>	<ul style="list-style-type: none"> ▪ Review and working knowledge of (functional and non-functional) requirements ▪ Review and understand the impact of user stories ▪ Review quality specifications and technical design documents to provide timely and meaningful feedback ▪ Draft and create positive / negative test cases ▪ Draft code to create automation testing, suites for extensive regression testing ▪ Coordinate testing phases and work levels collaboratively with test manager to estimate and prioritize testing activities ▪ Practice continuous improvement via retrospectives ▪ Able to work horizontally and vertically across the department with stakeholder, functions, culture and geographically located externally
<p>Lead Developer</p>	<p>Abdul Basit Aziz</p>	<ul style="list-style-type: none"> ▪ Salesforce and Community cloud development ▪ Developing and configuring, designing, and implementing Salesforce solutions ▪ Building Salesforce community-based portals ▪ Configure and extend the standard User interface in Salesforce communities



13. Assumptions & City Involvement

General Assumptions

- Any feature which is not part of the proposed solutions' current release shall be out of scope
- Client will provide strong sponsorship from top management to enable Speridian and the assigned project team to effectively execute the projects, resolve any issues and address any delays.
- Client will ensure that all stake holders are aware of project timelines and get their support and availability for discussions reviews and signoff within the time required. Any delays in this would have an impact to the schedule and deliverables.
- Client will appoint a dedicated program manager and process group leads who will act as coordinators for their related departments where required.
- Client will assign appropriate resources to enable Speridian to complete the listed project tasks within the timeframe specified in the project plan.
- Client will be responsible for providing all the required information about the Business, Application, Data and Technology components to ensure timely completion of the project tasks and deliverables.
- Client will provide the required office facilities to enable Speridian resources to conduct their tasks effectively.
- The Client Support Team from the IT support organizations will be provided in a timely manner. Any reasonable requests for extended build and testing support will not be unreasonably denied or delayed.
- For UAT, members of the user team—especially the resources who participated in the various discovery sessions—will be made available for executing the user testing activities.
- All necessary hardware and associated environments will be available as needed in conjunction with the project plan.
- No attempt will be made to change or improve the operation of the application without a CR.



Project Assumptions

- City will provide timely review and feedback on all submitted work products and deliverables per the mutually agreed project schedule.
- Access to key City staff when decision-making is required.
- City will facilitate any coordination and/or interdependencies with other system vendors, as necessary.
- The City's project team will make available documentation that is currently available for the existing system, updated data dictionary or ERDs, and target system interfaces documentation where applicable.
- The proposed solution environments and sandboxes would need to have connectivity with the respective internal DLL/External systems as necessary and provide interfaces for consumption.
- City will help setup service accounts for external interfaces required for consumption.
- The Speridian team will require access to external system Sandbox environments and/or access to resources who can help test with the integrating systems.
- Speridian data conversion team will require access to actual production data extracts and documents during the conversion phase. The availability of extracts is critical to the success of the conversion phase.
- Since Speridian will be providing in-person, instructor-led training, it is expected the City will provide classrooms and equipment for onsite training, if and as appropriate.



City Involvement

It is expected that the City will be providing overall IT System (network administration, system administration, database administration, etc.) support, e.g., System Administration support for necessary system and environment access, along with

- Project Management (PM) support.
- Subject Matter Expertise (SME) support covering all relevant systems and applications.
- Access to current systems and applications, particularly current Salesforce Sandbox and developer environments and Azure DevOps environment as appropriate.
- Necessary access and reasonable work accommodations for project team members, including but not necessarily limited to required building access, office space, desk, collaboration space, access to conference rooms, and any reasonable office equipment required to complete this project.

# City of Palm Desert High-Level Roles and Responsibilities	
A. INITIATION (PROJECT MANAGEMENT AND EXECUTION)	
1	Provide a full-time City Project Manager to represent this Project, to interface with the Speridian's PM, and coordinate with the Project Sponsor for decisions relating to the Project
2	Review and approve project deliverables according to the Master Project Management Plan
3	Provide Business champion(s) and IT champion(s) to help support and execute the Project activities suggested by Speridian
4	Review and approve all project deliverables
5	Review change requests and impact analysis, and approve as appropriate
B. DISCOVERY	
1	Schedule meetings with appropriate SMEs to develop and refine functional and technical requirements
2	Review and approve the Design Document
3	Conduct Final Acceptance Testing for all phases of the project
C. BULILD & CONFIGURATION	
1	Approves the configuration documentation and environments prior to migration of data and project use
2	Participate in iterations of the Solution and provide feedback until deemed satisfactory and acceptable per agreed upon metrics (e.g. exit criteria)



D. VALIDATION (TESTING)

1	Utilize test scripts and testing tools provided by the SI to participate in User Acceptance Testing (UAT) and provide feedback and testing results in format/tool provided by Speridian
2	Validate that the test results comply with BREG business rules, HAR/HRS requirements, test criteria and metrics
3	Approve testing results for all iterations and overall solution functionality prior to solution deployment

E. ROLL-OUT (DEPLOYMENT)

1	Review and approve deployment phases and deployment population (e.g. industry/business type) in Release Management Plan
2	Approve production deployment go/no-go decisions (per iteration/release as appropriate)

F. TRAINING

1	Coordinate training rooms and attendees for different training levels
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G. POST GO-LIVE WARRANTY AND ONGOING SUPPORT

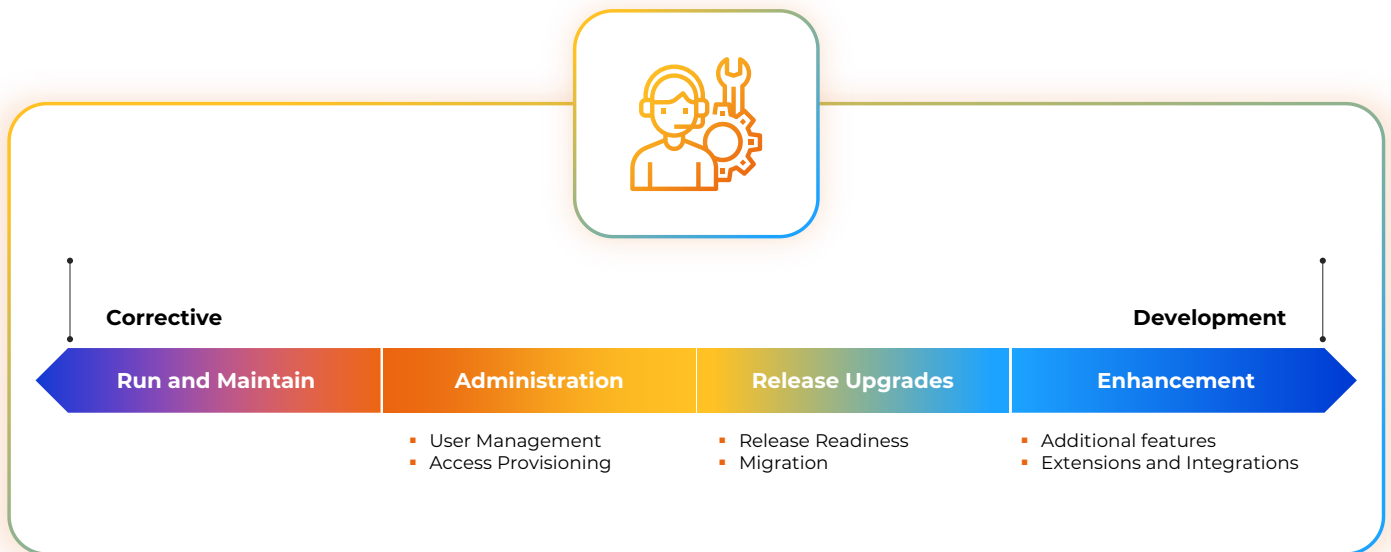
1	Review and approve changes to solution and regression test plans before implementation
2	Review and approve resolution and results of service requests and tickets before status is changed to "resolved" in ticketing system



14. Maintenance & Support

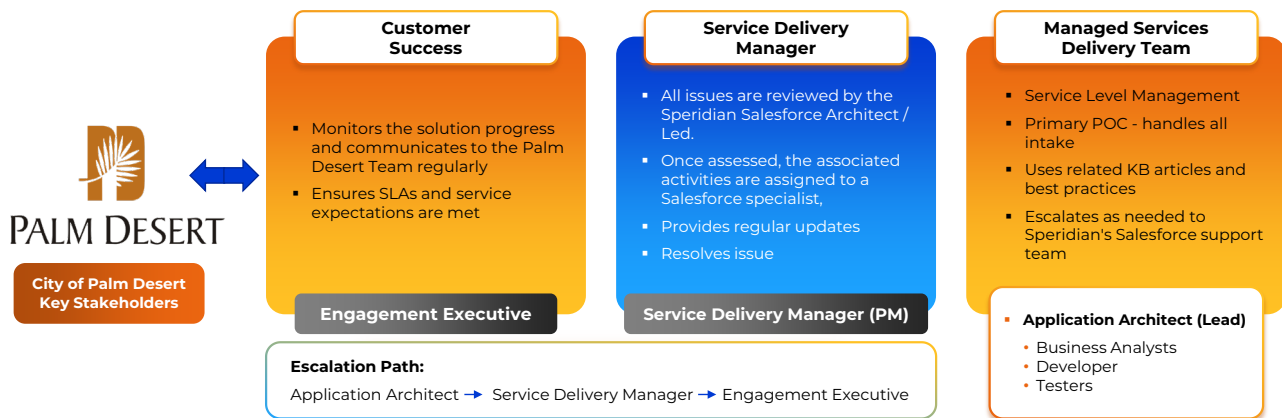
In addition to providing Clariti implementation services, Speridian can also provide on-going Maintenance & Support based upon the City’s needs.

Such support will be separately determined (via a separate SOW and is not included as part of the proposed services). Such support would be provided by Speridian’s Shared Services Group (SSG), which specializes in managing end-to-end Clariti and Salesforce Application support with tiered support levels running the spectrum from corrective to Development from “Run and Maintain” through deployment of sprint-based on-going backlog of enhancements.



Support Strategy

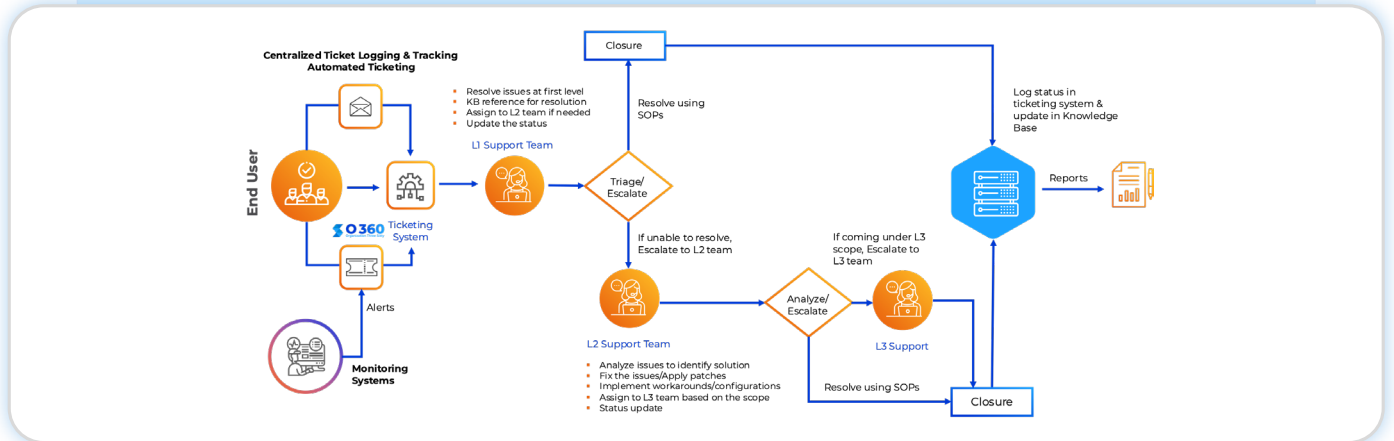
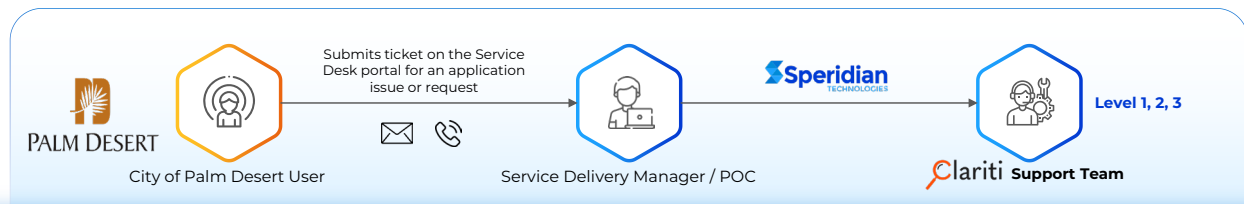
As part of Managed Support Services, Speridian will be deploying a dedicated support Point of Contact offsite for handling the support and maintenance requirements. The Speridian's Point of Contact will work with the customer's business point of contact, to identify and resolve customer issues if the issues are not resolved by City of Palm Desert level 1 support team and has been assigned to (Level 2 & Level 3) Support Team. He will also be responsible for conducting UAT and providing training to end users. There will be a team of resources (Functional Specialist, Architect, and Developers) to manage support and maintenance activities from offsite.



- Role: Salesforce Architect / Consultant to support, coordinate with the business and the technical team.
- Role: Business Analysis, Developers/Admin, and QA Testing resources to support L2, L3 activities and meet the SLA



High Level Process



Execution Team and Support Team Structure

Speridian will provide support resources offsite for Level 2 and Level 3 support lead by Delivery Manager and corresponding Salesforce Architect / Consultant who will provide support and coordinate with the City’s business and IT team(s).

Team Structure for Technical Support

This section will refer to how the technical support is split for meeting the problems that might appear when the final users are handling the software. The technical support levels will be split on 2 levels:

1. Collecting any requirements/incidents from the City of Palm Desert Level1 support team and sending it to the technical team that handles problems
2. Direct initiation of procedures destined to solve problems that require special technical abilities.

Technical Support Levels Responsibilities

Each level of support has set of responsibilities to be take care of. These responsibilities are listed out below:

Responsibilities for level 1 – City of Palm Desert Level 1 Support team

- Assuring support for local users
- Identifying and registering incidents



- Solving incidents based on experience and training
- Communicating the result to final users
- Route/Report incidents through Customer Ticketing System to Speridian Support Team

Responsibilities for level 2 – Speridian Team

- Assuring a database that contains incidents and a way of solving the incidents (assigning the incidents to the team of development that deals with the support phase)
- Collecting incidents from the first level of technical support
- Grouping incidents by errors
- Reproducing errors in a test phase, before third level of technical support
- Classification and qualification of errors
- Registering software errors

Responsibilities for level 3 – Speridian Team

- Solving incidents caused by errors considered to be critical
- Reproducing and analyzing the signaled errors
- Assuring that the errors are not still present in the application
- Testing the new application version
- Delivering the new version of application
- Analyzing change request forms



Support Timings

Speridian will provide offsite support model for standard working hours Monday to Friday (**City of Palm Desert Working Hours**). However, if P1 issues are raised during the working hours where the business functionality is impacted, SPERIDIAN will provide support after working hours.

Support Duration

This proposal is for providing support for the duration of 1 year (Extendable however, the City needs to initiate the extension before contract expiration).

Definition & Support SLA's

The following section describes the error classifications that will be handled as a part of this Support Project and the SLA's that needs to be achieved.

No	Error Class	Description
1	Severity1	This is catastrophic error. The error causes total failure of the software or results in unrecoverable data loss. E.g. System crash or Data Corruption
2	Severity2	This is an error that causes failure on critical parts of the system; causing the system not to operate in accordance with the specifications but still usable with difficulty and/or some disruption to business activity. A temporary solution may exist, but does not solve the entire problem
3	Severity3	This is an error that causes failure on non-critical parts of the system with no disruption to business activity. A temporary solution exists, and will be made available to the City .
4	Severity4	This is minor defect which is not impacting the Systems like Spelling errors etc.

SLA's

SLA is the agreed upon duration after the issue is communicated to Speridian until at least a temporary fix or workaround is available, or there is an action plan that is agreed to by **City of Palm Desert** and Speridian.

Incident	Definition	Impact	Action	Response Time
SEVERITY 1	Critical event / direct service impacting / complete service failure or similar events	Very High	Investigation and Response – IF the incident is not within their scope SLA clock will stop	60 Minutes
SEVERITY 2	Major event / direct service impact / Partial functionalities impacting	High	Investigation and Response – IF the incident is not within their scope SLA clock will stop	120 Minutes
SEVERITY 3	Non Service Impacting Administration	Medium		4 Hours
SEVERITY 4	Non Service Impacting Administration	Low		



15. Fees and Payment Schedule

The implementation of the Clariti Land Management solution will be executed by fixed-fee SOW as outlined in this document.

The following is a breakdown highlighting the total cost of ownership of the solution including licensing as well as implementation costs.

Consulting Services (Speridian)		# Hours	Cost (USD)
Project Management		745	\$ 89,400
Design/Requirements		480	\$ 57,600
Solution / Process Configuration		4,160	\$ 499,200
Integration Development		960	\$ 115,200
Report / Forms Development		100	\$ 12,000
Data Conversion		920	\$ 110,400
User Acceptance Testing		80	\$ 9,600
Onboarding Training		240	\$ 28,800
Admin/ Configuration Training		160	\$ 19,200
UAT Training		240	\$ 28,800
End-User Training*		120	\$ 14,400
Go-Live Support (4 weeks post-Go-Live Mon - Fri)		210	\$ 25,200
Travel (Kickoff, Discovery, UAT, Training) - 2 resources for 12 wks			\$ 72,000
TOTAL SERVICES		8,415	\$ 1,081,800
Licensing (Clariti)		# Units	Cost (USD)
Clariti Community Development Solution (includes)			\$ 243,075
Platform User License - Enhanced (includes)		120	
Admin License - Enhanced		5	
Clariti Admin License - Enhanced		1	
Clariti Salesforce Shield		1	
Clariti Sandbox, Full		1	
Clariti Sandbox, Developer Pro		1	
Clariti Data Storage (10GB)		1	
Clariti File Storage (10GB)		10	
Clariti Community Portal			\$ 16,000
Customer Community Logins (2,000/Month Bundle)		2	
Clariti Add-Ons			\$ 30,000
Clariti ESRI ArcGIS Integration		1	
Clariti Bluebeam Integration		1	
Clariti Guide		1	
Clariti Payments		1	
Clariti Professional Services			\$ 10,000
Clariti Guide Configuration		1	
TOTAL ANNUAL LICENSING			\$ 299,075



Projected Payment Schedule

Payment Milestones	Amount		Projected Dates*
	%	\$ (USD)	
Kick-off	10%	\$ 108,180	8-Jan-2024
Project Plan Signoff	10%	\$ 108,180	29-Jan-2024
Business Requirements Document (BRD) Signoff	10%	\$ 108,180	5-Feb-2024
Functional Design Document (FDD) Signoff	10%	\$ 108,180	19-Feb-2024
Solution Checkpoint 1 (Demo) Signoff	10%	\$ 108,180	11-Mar-2024
Solution Checkpoint 2 (Demo) Signoff	10%	\$ 108,180	22-Apr-2024
Solution Checkpoint 3 (Demo) Signoff	10%	\$ 108,180	22-Jul-2024
Development Complete (Demo) Signoff	10%	\$ 108,180	18-Nov-2024
UAT Signoff	10%	\$ 108,180	28-Dec-2024
Go-Live	10%	\$ 108,180	13-Jan-2025
TOTAL	100%	\$ 1,081,800	

*Note: Actual dates will be adjusted as per agreed upon project plan.

Projected TCO (3 Year Post Go-Live)

Clariti LMS Total Cost Summary for City of Palm Desert	3 Year Post Go-Live TCO				
	Year 0 (Go-Live)	Year 1	Year 2	Year 3	TOTAL
Licensing - Clariti	\$ 299,075	\$ 303,529	\$ 318,705	\$ 334,640	\$ 1,255,949
Services - Speridian	\$ 1,081,800				\$ 1,081,800
M&O (Managed Services) Support - Speridian	\$ -	\$ 50,625	\$ 67,500	\$ 67,500	\$ 185,625
TOTAL COST (SERVICES + LICENSING)	\$ 1,380,875	\$ 354,154	\$ 386,205	\$ 402,140	\$ 2,523,374

Licensing Notes

- Clariti Platform User License - Enhanced - Includes 30 Custom Objects. Customer Community contains access to 10 Custom Objects.
- Annual price increases of 5% to begin in Year 2 for the initial term
- Any purchase order generated on this quote indicates acceptance of the terms and conditions of the Clariti Software Agreement.
- Warranty is provided concurrent to licensing subscription for Clariti releases less than 1 year old.
- Clariti Community Portal – 2,000 logins/month bundle. This estimate includes 2 bundles (Login overages are calculated over a 12-month period from the start date of the contract.) Entitlements roll over from month to month. If you purchase 4,000 monthly logins, you are entitled to a total of 48,000 annual logins.
- Clariti Shield includes - Platform Encryption, Field Audit Trail, Event Monitoring
- Clariti Annual Support is provided and limited to Clariti software and configuration. Support for any 3rd party products or extensions not provided by Clariti are not covered under the Clariti support agreement.
- 10% of licensing is attributable to Letters Engine for internal Clariti accounting purposes.
- Clariti Admin User License included at no cost.

Exclusions

Workflow and configuration that goes beyond the Clariti product module's 'out of box' capabilities are excluded from subscription fees.

Invoicing

Speridian will support the required engagement and invoicing processes as directed by the City of Palm Desert and mutually agreed upon with Speridian.



15.1 Buffer Option

As part of this SOW, Speridian will offer the City of Palm Desert the option to add an 8-week buffer to the project in the event that the City determines such a buffer is necessary or desired.

This option will be made available for the City to exercise at any time up to or before the completion of the final Sprint as defined the final agreed upon Project Plan and Schedule, which has been graphically depicted in **Section 11. Timeline**.

The 8-week buffer has two components:

1. 6-week extension to the Development Phase, i.e., additional Sprints, and
2. 2-week extension to the Post Go-Live Warranty Phase for M&O support.

In the event the Buffer Option is exercised, the existing Project Plan and Schedule will be updated to reflect this extension accordingly, including, but necessarily limited to, updates to SIT, UAT, Deployment, Go-Live, Warranty Support, Project Closure, and Payment Schedule.

The Fees for exercising the Buffer Option will a fixed fee of **\$144,000** that would result in the following TCO for the City of Palm Desert:

Clariti LMS Total Cost Summary for City of Palm Desert	3 Year Post Go-Live TCO				
	Year 0 (Go-Live)	Year 1	Year 2	Year 3	TOTAL
Licensing - Clariti	\$ 299,075	\$ 303,529	\$ 318,705	\$ 334,640	\$ 1,255,949
Services - Speridian	\$ 1,225,800				\$ 1,225,800
M&O (Managed Services) Support - Speridian	\$ -	\$ 50,625	\$ 67,500	\$ 67,500	\$ 185,625
TOTAL COST (SERVICES + LICENSING)	\$1,524,875	\$354,154	\$ 386,205	\$ 402,140	\$ 2,667,374



16. Term & Termination

Term

Speridian shall commence the Services on the SOW Start Date. The parties will cooperate so that all of the Services will be completed, and Speridian will furnish their Deliverables to City of Palm Desert, on or prior to the SOW End Date.

Termination

City of Palm Desert may terminate this SOW for convenience upon thirty (30) days prior written notice to Speridian. The date set forth in such notice of termination will hereinafter be referred to as the “Cancellation Date.”

If the City terminates this SOW for convenience prior to completion of all of the Services required hereunder, City of Palm Desert will, in accordance with Section 17 of this SOW (Fees and Payment Schedule) above, pay Speridian for all Services performed prior to the Cancellation Date.

Miscellaneous

The provisions of this SOW which by their nature are intended to survive the termination, completion, or expiration of the SOW shall continue as valid and enforceable obligations of the parties notwithstanding any such termination, cancellation, completion, or expiration.

This SOW contains the entire agreement between the parties with respect to the matters addressed herein and supersedes all prior agreements, understandings, writings, proposals, representations, and communications, oral or written, of either party with respect to such subject matters, but is subject to the Agreement as specified herein. No changes, amendments, or modifications of any provision of this SOW will be valid unless made by an instrument in writing, and agreed upon with the signature of both parties.



17. Signature

The undersigned have made, agree upon, and shall perform the forgoing SOW, which is incorporated into this SOW as described above. **By signing below, Speridian represents and warrants Speridian’s name set forth in the below signature block is the supplier’s exact legal name.** The parties hereby enter into this SOW.

Any person signing this SOW on behalf of a party is an authorized representative of that party and warrants that they have the full authority to sign this SOW.

City of Palm Desert, CA	Speridian Technologies, LLC
By:	By:
Name:	Name:
Title:	Title:
Date:	Date:



18. APPENDIX A - Case Studies

Client# 1	Information
Client Type	Local (US)
Client Name	Orange County Public Works (OCPW)
Project Name	Land Developer Community
Project Objective	<p>Orange County Public Works (OCPW) was looking to modernize the way the C Country does business with (including general public, applicants, residents, surveyors, engineers and developers) and general citizen engagement by developing electronic processes to support developers and the public in their interactions for county services. OCPW selected Clariti to act as a comprehensive system that can accept input, organize, process and track development related permits, cases and entitlements through the entire development process. The flexibility in the solution also addresses non development related workflows such as Code Enforcement, Business Registration and Public Works maintenance/repair requests. The system provides robust reporting and auditing components and overall helps to improve OCPW's business processes. OCPW's processes are constantly adapted to meet new challenges and requirements; a system that can quickly respond to these changes was required. The Clariti solution helped OCPW realize many benefits including but not limited to:</p> <ul style="list-style-type: none"> ▪ Providing tools to increase efficiency and responsiveness from OCPW Staff with customers ▪ Improving efficiency and performance country within operation ▪ Monitoring and reporting usage statistics to agency management ▪ Tightly integrating the solution with the preferred Salesforce CRM Platform · Integrating with the country's GIS



Client# 2	Information
Client Type	Local (US)
Client Name	City of Hampton, VA
Project Name	Land Management and Permitting System
Project Objective	<p>The City of Hampton (pop. 137,000) uses Clariti to handle all land management and permitting functions servicing citizens and developers. The entire solution is hosted on the Salesforce platform and features a variety of out-of-the-box tools specific to the permitting and inspection solution that is deployed with all Clariti customers. These tools include workflow management, document creation, financial transaction management, payments management, ESRI GIS Sync and ESRI Map Viewers. It features a portal for purchasing permits online, as well as handling all transactional reporting.</p> <p>The solution manages the workflow related to issuance of permits, resulting inspections, and final compliance of an issued permit. The city also implemented a Clariti mobile inspection solution as part of a larger Community Development system project. The project involved implementation for 110 unique users/seat, multi-module deployment that includes enforcement, compliance, licensing, permitting, planning, local cashiering, and online payments. Inspectors in the Community Development Department respond to complaints and inspection requests in the field with the Clariti application, powered by the Salesforce Platform and integrated with the</p> <p>City's ESRI Geographic Information System (GIS). More than 40 remote inspectors are using Clariti for detailed mechanical, electrical and other inspection types against permits and property.</p> <p>The initial data load, migrating from the Accela Permits Plus solution, transferred over 1 million inspection records upon go live. The organization currently has well over 280GB of File and 12 GB of Data storage.</p>



Client# 3	Information
Client Type	Regional
Client Name	Halton Region
Project Name	Halton Region (311) Modernization
Project Objective	<p>Speridian upgraded and modernized the 311 Case Management system for Halton Region (pop 610,000).</p> <ul style="list-style-type: none"> ▪ Upgraded and modernized the Halton region 311 call center. ▪ Integrated Modernized Computer Telephony Interface with Case Management application. ▪ Implemented Single Sign-on and Integrated windows authentication. ▪ Upgraded reporting and dashboard capability. ▪ Improved overall efficiency and workflow supporting 300 Concurrent Users, with 7 days operations and a 24-hourportal access.

