

# City of Palm Desert



## Clariti Implementation – Phase 2 Business License and Additional Items

### Statement of Work

October 10, 2025



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**SPERIDIAN CONTRACT INFORMATION**

**Customer Name: City of Palm Desert**

**Exhibit Number: SOW Number 2**

Customer Name:	City of Palm Desert	Speridian Technologies, LLC
Customer Address:	73510 Fred Waring Drive Palm Desert, CA 92260-2578 USA	2355 Main Street, Suite 240 Irvine, CA 92614
Contact:	Clayton von Helf	Contact: Cindy Sullivan
Phone:	(760) 776-6338	Phone: (925) 963-3020
Email:	cvonhelf@palmdesert.gov	Email: <a href="mailto:cindy.sullivan@speridian.com">cindy.sullivan@speridian.com</a>

**Contact Information**

<b>Speridian Contracts Manager/Administrator:</b>	
Name:	David Galceran
Address:	2355 Main Street, Suite 240 Irvine, CA 92614
Phone:	(949) 242-3313
Email:	david.galceran@speridian.com

<b>Client Accounts Payable:</b>	
Name:	Accounts Payable
Address:	73510 Fred Waring Drive Palm Desert, CA 92260-2578 USA
Phone:	
Email:	

<b>Speridian Project Manager</b>	
Name:	Mario Noronha
Address:	2355 Main Street, Suite 240 Irvine, CA 92614
Phone:	(437) 661-2939
Email:	Mario.noronha@speridian.com

<b>Client Project Manager</b>	
Name:	Clayton von Helf
Address:	73510 Fred Waring Drive Palm Desert, CA 92260-2578 USA
Phone:	(760) 776-6338
Email:	cvonhelf@palmdesert.gov

**1. Background**

The services described herein (“Statement of Work”) (“SOW”), effective from the date signed shall be governed by the terms of the Professional Services Agreement, dated October 25,



2025, between Speridian Technologies LLC (“Speridian”), and City of Palm Desert (“You” or “Your”).

Speridian will work under this SOW for providing Phase 2 Services for the City of Palm Desert **Clariti Community Development (CD)** Software, which Speridian implemented.

## 2. Scope of Work

The following services are included as part of the Statement of Work:

- Implementation of Business Licenses Module
- Additional configuration and modifications to Clariti Software implementation
- Managed Support Services during Phase 2

### 2.1 Clariti Business License Module

The Clariti Business Licensing solution enables the City of Palm Desert to manage the full lifecycle of business licenses, ensuring regulatory compliance, public safety, and operational transparency. The system supports initial application, review, inspection (where applicable), issuance, and renewal processes, with configurable workflows tailored to the City’s licensing requirements.

Business licenses are issued to ensure that entities operating within the City are in good standing, having paid taxes, maintained insurance, and complied with local ordinances. The solution accommodates various license types such as restaurants, daycares, tattoo parlors, and medical dispensaries, and integrates with other departments (e.g., Fire or Building) for inspection and compliance tracking.

Key features include:

- Online intake and application submission
- Automated fee calculation and payment processing
- Multi-departmental review workflows
- Inspection scheduling and tracking
- License issuance with expiration management
- Renewal notifications and processing

Clariti’s flexible data model and configurable license journeys allow the City to manage licenses individually or in bulk, with support for endorsements, conditional submissions, and complex expiration rules. The system also integrates with external systems and supports robust reporting, document generation, and online portal access for applicants.

#### 2.1.1 Business License Scope

Palm Desert is currently using HdL to process their business License. These are typical volumes from September 2025.

License Status	Count
New / in process	619
Current	5,526
Renewal Sent / Delinquent	2,607
<b>Total</b>	<b>8,752</b>



The following Business License types will be configured and implemented using Clariti's standard Business Licensing functionality, tailored to meet the operational and regulatory needs of the City of Palm Desert.

Description	Subtype	Fees
Category A - In City (Retail sales, amusement centers, clubs, professionals, agents)	N/A	Annual - Flat
Category B – Contractors (Constructors, subcontractors, specialty trades)		Annual – Varies by State license and class
Category C – Out-of-City (solicitors, vendors, service providers)		Varies
Special District	Subtype 1	Multiplier
Special District	Subtype 2	Multiplier
Special District	Subtype 3	Multiplier
Special District	Subtype 4	Multiplier

In addition to core license configuration, the following supporting features will be implemented to enable a complete and efficient Business Licensing process within the Clariti system.

- Portal Intake – Additional pages added to current Clariti Portal
- Fee Calculation and Payment Processing – Existing payment processor will be used.
- Application Automation – For Processing
- License Automation – For annual Renewals and notifications of renewals
- Letter Templates
- Email Templates
- Inspection Scheduling using existing Inspection functionality, if needed
- Report Dashboard and list to manage Business License
- Training session(s) focused on educating business license users about new modules, enhancements, reporting and workflow updates.  
Internally focused for staff.

Out of Scope:

- No additional Interfaces are expected to be added for Business Licenses
- Adjustment of license expiration dates. Expiration dates on the records will be used, typically 1 year from issuance.

## 2.1.2 Data Migration from HdL

The City will provide data exports of existing Business License records from the HdL system. This dataset will be mapped to Clariti's licensing data model and imported using Clariti's



standard data import tools. Given the expected simplicity of the source file, a streamlined import process is anticipated.

Field Name	Example Value
Account Number	11714555
Business Name (DBA)	ACME CONSTRUCTION
Business Address Line 1	112 MAIN STREET STE A
Business Address Line 2	SAN MARCOS, CA 92078-3823
Located Inside City	No
Location Type	Commercial
Mailing Address Line 1	112 MAIN STREET STE A
Mailing Address Line 2	SAN MARCOS, CA 92078-3823
Phone Number	(760) 747-1111
Email Address	ted.lasso@acme.com
Rate Class	Business License
Rate Type	Category B – Licensed Contractors
Business Type	CONTRACTOR – GENERAL
SIC Code	1542001
SIC Description	General Contractors – Nonresidential Buildings, Other Than Industrial Buildings
NAICS Code	334115
NAICS Description	New Single-Family Housing Construction (except Operative Builders)
Account Type	New Application
Business Status	Active
License Status	Current
Start Date	04/23/2025
Submittal Date	04/23/2025
Expire Date	03/31/2026

### 2.1.3 Project Management Methodology and Timeline

Speridian will implement the Clariti Business Licensing module using our standard hybrid agile-waterfall methodology, previously applied during the City’s original Clariti implementation. For this smaller, focused project, the approach will be streamlined to accelerate delivery while maintaining alignment with Palm Desert’s operational goals. This proven methodology emphasizes collaboration, transparency, and rapid value delivery, with minimal disruption to City operations. Key phases include Initiation, Discovery, Configuration, Validation, and Go-Live, each supported by structured workshops, sprint-based development, and iterative testing.

Speridian proposes a structured, phased implementation approach spanning **23 weeks**, designed to deliver measurable value early while ensuring long-term sustainability and

stakeholder alignment. The timeline is broken into distinct phases that reflect the City's operational priorities and the complexity of the Business License transformation into the Clariti system.

1. **Discovery & Sprint 0**  
**Weeks 1-4 (January 6, 2026 – January 31, 2026)**
  - Stakeholder workshops
  - Requirements gathering
  - Initial backlog creation
  - Environment setup and planning
  
2. **Sprint 1-3**  
**Weeks 5-13 (February 3, 2026 – April 4, 2026)**
  - Iterative configuration and development
  - Each release focuses on a specific functional area (e.g., Permitting, Planning, Code Enforcement, Licensing, Inspections, Fees, Reports, Integrations)
  - Includes sprint planning, design, configuration, unit testing, and internal validation
  - Releases are sequenced to balance complexity, resource availability, and business impact
  
3. **System Integration Testing (SIT)**  
**Weeks 14-16 (April 7, 2026 – April 25, 2026)**
  - End-to-end testing across all configured modules
  - Validation of integrations, workflows, and data flows
  - Issue triage and resolution
  
4. **User Acceptance Testing (UAT)**  
**Weeks 17-20 (April 28, 2026 – May 23, 2026)**
  - City-led testing of configured solution
  - Feedback collection and rework
  - Final readiness assessment
  
5. **Deployment & Go-Live**  
**Weeks 21 (May 26, 2026 – May 30, 2026)**
  - Production environment setup
  - Final data migration
  - Cutover planning and execution
  - Staff training and go-live support
  
6. **Hypercare Support**  
**Weeks 22-23 (June 2, 2026 – June 13, 2026)**
  - Post-go-live stabilization
  - Issue resolution and performance monitoring
  - Transition to ongoing support

## 2.2 Phase 2 Additions and Improvements



During the initial Clariti implementation, several items were identified that fell outside the original scope or represented late-stage changes to previously defined requirements. These items were captured in a backlog but were not implemented due to timing constraints or evolving priorities.

For Phase 2, Speridian will work collaboratively with the City of Palm Desert to evaluate and address this backlog. Rather than committing to a fixed list of enhancements, this phase will be structured around a **time-and-materials model** with a cap, allowing flexibility to prioritize and refine items based on current operational needs.

### **Backlog Management Process**

- A **weekly or bi-weekly prioritization meeting** will be held with City stakeholders to review the backlog, clarify requirements, and define user stories.
- Items will be **estimated and ranked** by priority, with the highest-value items selected for development.
- Work will proceed in **agile sprints**, with each sprint including:
  - Scope refinement and estimation
  - Configuration and development
  - Quality assurance (QA)
  - User Acceptance Testing (UAT)
  - Production deployment following successful UAT

This iterative approach ensures that enhancements are delivered efficiently, with continuous feedback and alignment to City goals. It also allows for flexibility as users gain experience with the live system and reassess the necessity or impact of previously requested changes.

### **Time Allocation**

The scope of Phase 2 will be defined by a **block of hours** dedicated to backlog refinement, development, testing, and deployment. This structure enables the City to maximize value while maintaining control over priorities and budget.

## **2.3 Speridian Managed Services**

To support the ongoing success of the Clariti implementation, Speridian will provide managed services to the City of Palm Desert throughout Phase 2. While enhancements and backlog items are addressed in parallel, Speridian will continue to monitor and resolve production issues, ensuring system stability and user satisfaction.

All support activities will be tracked and managed through Speridian's **JIRA Service Desk**, with defined service level objectives (SLOs) and transparent communication.

### **Support Areas and Responsibilities**

Support Area	Speridian Tasks
<b>Business Support</b>	<ul style="list-style-type: none"> <li>- Manage break/fix tickets raised by the City</li> <li>- Perform root cause analysis and resolution</li> <li>- Assist users with daily inquiries and troubleshooting</li> </ul>
<b>Application Support</b>	<ul style="list-style-type: none"> <li>- Manage user accounts, roles, and permissions</li> <li>- Configure security settings to maintain appropriate access controls</li> </ul>
<b>Data Management</b>	<ul style="list-style-type: none"> <li>- Configure list views for efficient data navigation</li> <li>- Update reports and dashboards to reflect evolving business needs</li> </ul>
<b>Integration Support</b>	<ul style="list-style-type: none"> <li>- Monitor data flows between integrated systems</li> <li>- Provide alerts for anomalies or disruptions</li> <li>- Resolve integration-related issues in collaboration with stakeholders</li> </ul> <p><b>Note:</b> Integration development, customization, and data upgrades are out of scope</p>
<b>Release Support</b>	<ul style="list-style-type: none"> <li>- Assist with Clariti release cycle management</li> <li>- Provide release summaries and recommendations for feature adoption</li> <li>- Support change management and deployment planning</li> </ul>

### Configuration and Change Requests

Any configuration changes will be handled in the Phase 2 Backlog process.

## 3. Your Obligations and Project Assumptions

You acknowledge that Speridian’s ability to perform the Services and any related tasks depends upon your fulfillment of the following obligations and the following project assumptions:

### 3.1 Your Obligations

- Provide Speridian with reasonable access to the relevant functional, technical, and business resources to support the performance of the Services.
- Provide Speridian with accurate documentation of the severity of defects being reported.
- Provide development, testing and production environments.
- Be responsible for allocating user acceptance testing resources and the creation and execution of relevant test scripts.
- Respond to support-related inquiries and information requests from the Speridian team in a timely manner to ensure efficient issue resolution and continuity of service. Maintain a properly configured hardware/operating system platform to support the applications.
- Designate Project Manager(s) who shall be responsible for coordinating with Speridian’s Service Delivery Manager and Project Manager for all project management and the direction of services provided to you by Speridian.

### 3.2 Speridian Obligations

- Speridian will provide training on accessing and submitting tickets through Speridian's Managed Support Services ticketing platform.
- Speridian will provide support for addressing defects, bugs, technical issues, features, upgrades, or enhancements at the request/direction of Palm Desert.
- Speridian will provide detailed solutions to be reviewed by Palm Desert for review and approval prior to doing any configuration or development.
- Speridian will perform primary functional testing and unit testing, and as such, will work closely with Palm Desert's QA team supporting all aspects of testing.
- Speridian will assign a Service Manager that will be responsible for tracking and reporting on requests, activity, project, and budget consumption associated with the managed services.
- Speridian will assign a dedicated Project Manager responsible for overseeing the implementation of Business Licensing and Phase 2 enhancements. This individual will manage project activities, track progress against the timeline and budget, and provide regular status reporting to the City of Palm Desert.

### 7.3 Support Assumptions

- Speridian will provide Standard Support during hours of business operation: Monday through Friday, 8 a.m. PST to 5 p.m. PST.
- The support in this engagement will be delivered by Speridian using a blended onshore/offshore delivery model.
- This Applicational Support and Operational Support will follow a shared resource model. Resource assignments will be made at Speridian's discretion.
- Speridian's ticketing system will be used to manage work requests under this engagement.
- Speridian and the client will organize and conduct work planning meetings to outline the required Operational and Application Support needed for the month.
- Speridian will provide regular status reports which will include a summary of progress made towards Operational or Application Support requests and budget consumption.
- CLARITI, a Software-as-a-Service (SaaS) solution built on Salesforce.com, may experience issues between Priority Levels 1, 2, and some Level 3 issues that are outside Contractor's and CLARITI's control, being solely attributable to Salesforce.com. For these issues, Contractor will escalate to Salesforce.com. For Salesforce.com platform issues, Salesforce only offers response times and a resolution plan without definite resolution times. Therefore, Contractor is limited to providing a resolution plan with expected response durations. For more details, refer to Salesforce.com support documentation. For Salesforce.com issues, the Contractor will continue to engage with Salesforce.com until resolution. The Contractor will keep the City informed during the process.



- Any services that require access to Salesforce and/or Clariti hosting environments, servers and folder access to which Speridian doesn't have access, and product related issues which require support from either the Salesforce or Clariti Product Development team, are NOT covered under this agreement.
- Any travel-related costs would be handled on a case-by-case basis and would be billed to the client as actuals for the duration of the required support.

## 4. Fees

The total amount of this Statement of work is **\$205,820**.

Description	Hours	List Rate (Per Hour)	Discounted Rate	Amount
Business License	1360	130	92	\$125,120
Phase 2 Additions	600	130	92	\$55,200
Managed Services Support (6 months, issue/bug fix)	300	130	85	\$25,500
<b>Total</b>	<b>2260</b>			<b>\$205,820</b>

### Payment Schedule

Deliverable/Date	Date	Amount
Signed SOW	January 2, 2026	\$34,303.33
Discovery (First Month)	January 31, 2026	\$34,303.33
Sprint 1 (Second Month)	February 28, 2026	\$34,303.33
Sprint 2 & 3 (Third Month)	March 31, 2026	\$34,303.33
SIT (Fourth Month)	April 30, 2026	\$34,303.33
Production Deployment Business License (Fifth Month)	May 31, 2026	\$34,303.33

- The client agrees to pay Speridian the invoice amount within 30 days from receipt of invoices.
- Travel is not included in this contract. Should the client require Speridian to travel, travel by Speridian must be pre-approved in writing by the client for such expenses to be reimbursable under this SOW. Travel expenses will be reimbursed by the client at cost.

### Agreement Change

- If the client wishes to add or change the above team composition, a change order will be required.



## **5. Review Meetings**

City of Palm Desert and Speridian Support Managers shall have monthly meetings (“Review Meetings”) which may be attended remotely to monitor, review, and discuss the performance of the Services.

Before each Review Meeting, each representative shall notify the other of any material problems and/or concerns relating to the performance of the Services for discussion at the Review Meeting. At the Review Meeting, the parties shall work in good faith to agree on a plan to address such problems.

In the event of any problem being unresolved or a failure to agree on a place for rectification of the problem, the matter shall be resolved under the terms of the Agreement. Progress in implementing any remediation plans shall be included in the agenda for subsequent Review Meetings.

## **6. Required Consents**

City of Palm Desert is responsible for promptly obtaining and providing to Speridian all Required Consents necessary for Speridian to provide the Services described in the SOW. A Required Consent means any consents or approvals required to give Speridian the right or license to access, use and/or modify the hardware, software, firmware, and other products City of Palm Desert uses.

## **7. Security and Privacy Guidelines**

During the Term of any SoW established under the Maintenance Services Agreement, Speridian shall maintain the security and privacy requirements as set forth in the Agreement or as required by City of Palm Desert, and Speridian shall require all subcontractors performing any services under the terms of the Agreement or this SOW, as a condition to their engagement, to provide their services in full compliance with such requirements. Any changes to the existing physical or logical controls that affect, or impact City of Palm Desert must be approved by City of Palm Desert in advance and requested on a Change Request Form.



## 8. Execution

IN WITNESS WHEREOF, the parties have caused this SOW to be duly executed below.

By approving this Engagement Agreement, the client authorizes Speridian to commence the services designated above and agrees to these terms and conditions including the payment terms. Approval of this Agreement shall be made by receipt of this document with an authorized formal signature. Speridian will counter-sign and return a copy for City of Palm Desert's records.

This quote shall become binding upon execution by You and acceptance by Speridian.	
<b>City of Palm Desert:</b>	<b>SPERIDIAN TECHNOLOGIES LLC:</b>
Authorized Signature:	Authorized Signature:
_____	_____
Name:	Name: Satish Ganta
Title: Solutions	Title: Sr. Vice President, Enterprise
Signature Date: _____	Signature Date: _____