



HOLISTIC

SYSTEM INTEGRATION SOLUTIONS

NOVEMBER 18, 2025

PROPOSAL FOR SERVICES

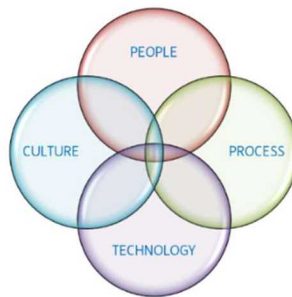
OVERVIEW

In October, 2025, the City of Palm Desert implemented phase 1 of their new land management software system, Clariti. Phase 1 consisted of all planning, building, land management, public works and development services center permits and applications for online application and electronic processing. Phase 2 of the Clariti system is planned to begin January, 2026. This consists of enhancements and further refinement to phase 1 Clariti related items, Business License and integration of Fire plan check/permit services. Additional items to support phase 2 items include Fire fee schedule development/implementation and permit technician support services. The City of Palm Desert seeks to engage consulting services to support defined goals for phase 2 Clariti implementation and continued phase 1, post-implementation support.

To support future system implementation/integration goals, the City of Palm Desert desires to partner with a consultant that possesses intricate knowledge of land development, business license processes and Fire fee schedule development and plan check implementation/integration.

Our in-depth understanding of Development Services, municipal land development processes and proven system implementation/integration experience, paired with the City's desire to expand current business process and system effectiveness while successfully achieving future system implementation, ensures a seamless collaboration.

Holistic System Integration Solutions has developed solutions that utilize a holistic approach to system design and integration by balancing four major elements that are key to successful system implementation – People, Culture, Process, and Technology. This approach delivers system integration on a global scale while taking-into-account and minimizing adverse impacts to the organization.



Execution Strategy

Our success is attributed to an execution strategy that incorporates the Lean Six Sigma, DMAIC (Define, Measure, Analyze, Improve, Control) method to software implementation/integration. The DMAIC approach allows us to continually identify and apply improvements to business processes through software system design that result in enhanced system performance.

Change management strategies have been built into our programs to assist with the least impactful introduction of end-users to the TRAKiT environment. This approach is imperative to organizational health.

Scope Deliverables

- Clariti, Phase 2 implementation, integration and training for:
 - o Development Services - Phase 2
 - o Business License
 - o Fire
- Fire plan check/permit fee schedule development/implementation
- Supplemental staffing to the City’s Development Services Center
- Develop, standardize and implement streamlining opportunities, standard operating procedures and City policy for improved customer service
- Develop and implement process/project action teams to achieve project goals
- Business process enhancements/standardization support and training of the Clariti software system
- Business process enhancements/standardization support and training of Bluebeam electronic plan review.
- Permit Technician support services
- Continued Phase 1, post-implementation support
- Phase 2, post Implementation support

Resources

In order to meet project objectives, the City will make available the following resources:

- Remote access to relevant software systems test and live environments.
- Dedicated profile for relevant systems with administrative permissions to test and live environments
- Ability to configure in test and live environments with Administrative level permissions
- Current User and Admin Guides for configuration of all relevant software systems
- Ability to communicate with end-users for revolving feedback of system performance, as needed
- Access to:
 - o Access to software systems Technical Support team to communicate system needs, create tickets and assign tasks, as needed
 - o City’s IT staff to coordinate system upgrades, integrations, etc... (as needed)
 - o City’s SQL/Crystal/Cognos Report Writing Specialist/Consultant (if available) with ability to coordinate and assign tasks, as needed
 - o City’s GIS Specialist/Consultant (if available) with ability to coordinate and assign tasks, as needed
- Other resources may be identified in order to meet project objectives

The following materials shall be made available during the on-site visit:

Materials to be supplied by the City of Palm Desert
Conference room to conduct group meetings with large monitor and white board for process mapping
Internet access
Temporary workstation
Access to on-site color printer
Other materials as requested in order to meet project objectives

HOLISTIC RATES

Cost of Services/Hour	No. of Hours	Cost
Principal Consultant (30 hrs/week)	1560	\$125/hr.
Technical Project Coordinator/Permit Technician (30 hrs/week)	1560	\$75/hr.
Total Project Cost		
12 MONTH TOTAL COST - NOT TO EXCEED		\$312,000
Reimbursable Expenses		Billing
Printing, Reproduction, Scanning, etc.		Direct Cost plus 10%
Sub-Consultant Fees (If needed)		To be contracted separately

Disclaimer: The prices listed in the preceding table are an estimate for the services discussed. This summary is not a warranty of final price. Estimates are subject to change if project specifications are changed or costs for outsourced services are identified before a contract is executed. Should additional services, such as re-configuration of application types, inspections or other system needs be identified throughout the duration of this project in order to achieve project goals, services will be outlined and costed under separate proposal for services.

CONCLUSION

We look forward to working with the City of Palm Desert to provide supplemental staff support services for the Development Services Center. We are confident that we can meet the challenges ahead and stand ready to partner with you in delivering an effective integrated support solution.

If you have questions on this proposal, feel free to contact Angelica Zarco at your convenience by email at azarco@holisticsystemint.com or by phone at (760)861-6532. We will be in touch to arrange a follow-up conversation on the proposal.

Respectfully,



Angelica Zarco, President



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