**AMENDMENT NUMBER THREE
TO PROFESSIONAL SERVICES AGREEMENT
WITH
PARK CONSULTING GROUP, INC.**

THIS AMENDMENT NUMBER THREE ("Amendment") is made and entered into this 19th day of April, 2022 ("Effective Date"), by and between the CITY OF COSTA MESA, a municipal corporation ("City"), and PARK CONSULTING GROUP, INC., a California corporation ("Consultant").

WHEREAS, City and Consultant entered into an agreement dated September 24, 2021 for Consultant to provide consulting services (the "Agreement"); and

WHEREAS, City and Consultant amended Consultant's maximum annual compensation through Amendment Number One to the Agreement, dated December 13, 2021; and

WHEREAS, City and Consultant amended the Scope of Services and increased Consultant's maximum annual compensation through Amendment Number Two to the Agreement, dated March 21, 2022; and

WHEREAS, City and Consultant now desire to amend the Scope of Services to include the additional services set forth in Exhibit "A," attached hereto and incorporated herein; and

WHEREAS, City desires to amend the Agreement to reflect that Consultant's maximum compensation shall not exceed Three Hundred Ninety-Three Thousand Two Hundred Fifty Dollars ($393,250.00); and

WHEREAS, City and Consultant desire to amend Section 4.1 of the Agreement as set forth herein.

NOW, THEREFORE, for valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

1.   The Scope of Services shall be amended to include the additional services set forth in Exhibit A. City agrees to pay Consultant for such additional services in accordance with the fee schedules set forth in Exhibit A.

2.   Section 2.1 of the Agreement shall be amended to read as follows:

        2.1.   Compensation. Consultant's total compensation shall not exceed Three Hundred Ninety-Three Thousand Two Hundred Fifty Dollars ($393,250.00).

3.   Section 4.1 of the Agreement shall be amended to read as follows:

        4.1.   Term. This Agreement shall commence on the Effective Date and continue through December 31, 2024, unless previously terminated as provided herein or as otherwise agreed to in writing by the parties.

4.   All terms not defined herein shall have the same meaning and use as set forth in the Agreement.

5.   All other terms, conditions, and provisions of the Agreement not in conflict with this Amendment shall remain in full force and effect.

6.   This Amendment may be executed in one or more counterparts, each of which shall be deemed an original. All counterparts shall be construed together and shall constitute one agreement.

IN WITNESS WHEREOF, the parties hereto have caused this Amendment to be executed by and through their respective authorized officers, as of the date first written above.

CITY OF COSTA MESA

_____   Date: _____
City Manager

CONSULTANT

_____   Date: _____
Signature

_____
Name and Title

ATTEST:

_____
City Clerk

APPROVED AS TO FORM:

_____   Date: _____
City Attorney

APPROVED AS TO INSURANCE:

_____   Date: _____
Risk Management

Park Consulting Group, Inc. Amendment Three

APPROVED AS TO CONTENT:

_____   Date: _____
Project Manager

DEPARTMENTAL APPROVAL:

_____   Date: _____
Economic and Development Services
Director

APPROVED AS TO PURCHASING:

_____   Date: _____
Finance Director

Park Consulting Group, Inc. Amendment Three

EXHIBIT A

ADDITIONAL SERVICES

![Park Consulting Group logo]

SCOPE OF SERVICES AND COST PROPOSAL

The following is Park Consulting Group's (PCG) proposed approach of the consulting services needed to support the City of Costa Mesa for the LMS Implementation Project – Sprint 4 Back-Office Configuration, Reports and Forms Design and Development, and Automations (I/O) Configuration:

<u>SPRINT 4 BACK-OFFICE CONFIGURATION:</u>

A. Park Consulting Group is responsible for the following tasks related to the completion of configuration and development detailed in Attachment 1:

- PCG will be responsible for the configuration of the Business Process Tracker items identified in Attachment 1, from the Tyler Tech EnerGov Project Sharepoint Site – Business Process Tracker. The original (first) 'Final-signed' Business Process Questionnaire .pdf attachments for each Business Process Tracker item will be the sole reference source for the configuration. Configuration will be performed in EnerGov v2021.

- PCG will facilitate reviews with the City's functional leads who are responsible to validate configuration that matches the Business Process Questionnaires and exiting configuration guide, Configuration Standardization Guide_vk20220314.docx, which itemizes some configurations already implemented within previous sprints and necessary for consistency or proper configuration.

- PCG will resolve configuration corrections identified by the City's functional leads based on non-matching configuration in comparison to the Questionnaires.

- PCG will facilitate reviews for correction validation with the City's functional leads who are responsible to validate configuration that matches the Business Process Questionnaires.

- PCG will provide a lead functional consultant for the project along with an additional functional consultant in order to achieve on-time delivery of milestones in Section C.

B. Key Assumptions

- City will provide a primary project contact available daily throughout the duration of services to successfully deliver PCG services. If the primary project contact is not available for a particular day, a back-up will be provided by the City.

- City will provide process leads and subject matter experts to serve as project team members that are sufficiently available throughout the duration of services to successfully deliver PCG services in a timely, efficient, and productive manner.

- In order to meet timelines, City SMEs will answer questions and provide feedback and

responses in a timely manner (within 2 business days).

- City estimates PCG should have the full ability to deliver the project remotely with no on-site visits and/ or incurred travel costs. If travel is required, PCG will seek approval from the City on travel expense reimbursement.

- Remote access and full system administrator access to EnerGov will be needed upon the start of work. This includes, and is not limited to, access to VPN/virtual desktop logins, Google Chrome and Internet Explorer, EnerGov Application, EnerGov Application Server, EnerGov Services Server, EnerGov Database and DB Server, and Tyler Tech Project Sharepoint.

- Configuration will be performed based on approved Business Process Questionnaires (in scope inventory provided in Attachment 1). If any changes are required or requested beyond the documentation in the Business Process Questionnaires, City will be responsible to track these as change requests. PCG may provide configuration changes based on the hourly rates provided in Section C. Hourly work must be approved by City's project manager in advance.

- Excluded sections of Business Process Questionnaires for configuration:
    - Automations Section – Excludes automations and georules configuration.
    - Reports Section – Excludes reports / forms development.
    - CSS Configuration – Excludes CSS or online-related configuration. This includes, and is not limited to: CSS Admin Case Type Creation, Online Custom Field Layouts, CSS Electronic Signatures, etc.

- Unconfigurable items - Business Process Questionnaires are based on the EnerGov system available at the time of PCG's configuration work and will have the ability to enable the functionality as specified in the Business Process Questionnaires. Any functionality that is not able to be configured and/or results in system errors will be excluded as required for milestone sign-off.

- Incomplete specifications - Business Process Questionnaires are complete and configurable by the City and Tyler Tech. Any gaps in specifications that prevent configuration completion will be excluded as required for milestone sign-off.

- Conflicting Configuration Work – Tyler Tech and City activities in the EnerGov system will not conflict with the PCG's configuration work. Any rework created by conflicting configuration work, such-as updates/ changes/ overwriting, will exclude the applicable Business Process components as required for milestone sign-off. The City may request rework to be completed by PCG based on the hourly rates provided in Section C.

- Dependent Global Configuration and Sprint 1 & 2 Configuration - The City and Tyler Tech are responsible for the configuration and setup of global configuration listed in

Client Questionnaire Results > Department = All Department and the planned Sprint 1 & Business Processes (provided on Feb 24, 2022). Global Configuration and Sprint 1 & 2 configuration that the Business Process Questionnaires are dependent on will be complete by the time PCG begins configuration activities. Any gaps in required configuration that prevent PCG's configuration completion will be excluded as required for milestone sign-off.

- Existing Configuration Clean-up – PCG will not be responsible for clean-up of existing configuration created by Tyler Tech or the City to complete configuration work. The City may request clean-up to be completed by PCG based on the hourly rates provided in Section C.

- Milestone schedule – The following 'Sprint' schedule provided by the City, in agreement with Tyler Tech, is based on the current project timeline. Fixed-price compensation is based on the Sprint schedule. If start dates and/or end dates of Sprints are adjusted by the City or Tyler Tech, a change order and additional compensation will be required to continue to secure PCG resources through the adjusted duration of the Sprint schedule.

Sprint	Start Date	End Date
Sprint 3	03/21/22	04/29/22
Sprint 4	05/02/22	06/17/22
Sprint 5	06/20/22	08/04/22
Sprint 6	08/05/22	09/23/22

- PCG will provide up to 2 hours review configuration with functional leads for each unique process. All taxonomies are included within the 2 hours for each unique configured process.

- Status meetings will be scheduled on an ad-hoc basis with the City as configuration progress is made. PCG will not be required to attend Tyler Tech meetings and other project meetings.

- PCG will proceed with this scope of work after Sprint 3 back-office configuration process items are completed.

![PARK - PARK CONSULTING GROUP]

C. Total not-to-exceed budget and duration of services:

- Total Not to Exceed: $79,000
- Duration of Services**:** April 19, 2022 – June 30, 2022
- PCG's services are proposed with a fixed-price compensation approach tied to the following/ milestones and deliverables. Each will be billed based on the back-office configuration completion of the following processes:

Milestones	ID	Process Name	Amount
Milestone 1	35	City Projects_Planning	$19,750
	31	Appeal_Planning	
	11	Banner Permit_Planning	
Milestone 2	40	Screenings_Planning	$19,750
	30	Antenna_Planning	
	9	Group Home Permit_Code	
	21	Public Entertainment Permit_Code Enforcement	
Milestone 3	15	CIP_Engineering	$19,750
	27	Subdivison Map_Engineering	
	28	Vacation-Abandonment Right-of-Way_Engineering	
	29	WQMP_Engineering	
Milestone 4	16	Construction Permit_Fire	$19,750
	24	SingleEventPermit_Fire	
	6	Film Permit_Transportation	
TOTAL AMOUNT			$79,000

*Cancellation of initiated milestones will result in full payment amount of the initiated milestone.

- Park Consulting Group provides a broad range of Building and Permitting System implementation, advisory, and development services. City may request additional services outside of the scope of services and will be considered based on the established hourly rates below:

PCG Resources		2022-23 Rates
LMS Configuration & Report Development	LMS Principal Consultant	$225/ hour
	LMS Lead Functional Consultant	$195/ hour
	LMS Functional / Configuration Consultant	$175/ hour
	Reports / Stored Procedure Developer	$175/ hour
GIS	GIS Principal Consultant	$195/ hour
	GIS Senior Consultant	$175/ hour
	GIS Consultant	$150/ hour
Server/ Network	Server/ Network Principal Consultant	$195/ hour
	Server/ Network Consultant	$175/ hour
	Server/ Network Technician	$150/ hour

ATTACHMENT 1

Business Process Tracker - Configuration Inventory

PCG will be responsible for the completion of the following Business Process Tracker items identified in the Tyler Tech EnerGov Project Sharepoint Site – Business Process Tracker. The original (first) 'Final-signed' .pdf attachment will be the reference source for the configuration.

ID	Process Name	Division
35	City Projects_Planning	Planning
31	Appeal_Planning	Planning
11	Banner Permit_Planning	Planning
40	Screenings_Planning	Planning
30	Antenna_Planning	Planning
9	Group Home Permit_Code	Code Enf
21	Public Entertainment Permit_Code Enforcement	Code Enf
15	CIP_Engineering	Engineering
27	Subdivison Map_Engineering	Engineering
28	Vacation-Abandonment Right-of-Way_Engineering	Engineering
29	WQMP_Engineering	Engineering
16	Construction Permit_Fire	Fire
24	SingleEventPermit_Fire	Fire
6	Film Permit_Transportation	Transportation

![PARK CONSULTING GROUP logo]

REPORTS & FORMS DEVELOPMENT:

Duration of services: April 1, 2022 – December 31, 2024

D. Park Consulting Group will provide the City of Costa Mesa with the services associated with the City's EnerGov implementation project such as those listed below:

Reports and Forms Design and Development:

- Provide report and form development services to design, develop, and deploy City-assigned non-standard forms and statistical reports generated from EnerGov. List of reports to be delivered are provided in Attachment 2.
- Reports and Forms will be developed with SSRS unless City approves the use of Crystal Reports.
- Park Consulting Group will own and perform the following services related to reports and forms design and development:
  - Review specifications document and provide feedback as required to ensure requirements are fully understood for development
  - Design and develop templates required for reports and forms (the City may have the opportunity to design and develop templates to conserve hours for PCG report and form development. This will be determined on a case-by-case basis by PCG)
  - Develop stored procedures and queries required for reports and forms
  - Prepare and stored procedures development package to be sent to Tyler Tech
  - Send and stored procedures/ queries as required by Tyler Tech and cc: City (PCG can also manage this process through a City facilitated process)
  - Attend meetings with City and Tyler Tech related to design, development, and deployment of reports and forms
- City of Costa Mesa will own and perform the following activities related to reports and forms design and development in an effort to create a more seamless transition for the City's staff to self-support the reports after Go-Live:
  - Provide a prioritized list of reports and forms to be developed before Go-Live
  - Information gathering and specifications of reports and forms required to be developed with comments in PDF or Word doc format detailing the filters, EnerGov module, case types and workclasses, standard and custom fields, workflow steps, workflow actions, activities, etc. (If configuration is not complete when PCG report and form design and development work begins, additional hours and effort will be required to address delays and rework)
  - Populate all sample data (and all process variations) related to the required reports and forms in applicable EnerGov environment(s). This is to ensure queries return expected data during development, QA, and testing
  - Test deployed reports within all applicable modules and case types and provide feedback and issues to PCG
- City of Costa Mesa will work with Tyler Tech to provide the following for PCG:
  - Access to Tyler Tech Sharepoint Site and Report Tracker
  - Regular database backups of the EnerGov environment with the most up-to-date configuration and all related populated test data

- Database backups to be transferrable to PCG technical environments to develop reports and forms

E. Key Assumptions

- City will provide a primary project contact available daily throughout the duration of services to successfully deliver PCG services. If the primary project contact is not available for a particular day, a back-up will be provided by the City.

- City will provide process leads and subject matter experts to serve as project team members that are sufficiently available throughout the duration of services to successfully deliver PCG services in a timely, efficient, and productive manner.

- In order to meet timelines, City SMEs will answer questions and provide feedback and responses in a timely manner (within 2 business days).

- City estimates PCG should have the full ability to deliver the project remotely with no on-site visits and/ or incurred travel costs. If travel is required, PCG will seek approval from the City on travel expense reimbursement.

- Remote access and full system administrator access to EnerGov will be needed upon the start of work. This includes, and is not limited to, access to VPN/virtual desktop logins, Google Chrome and Internet Explorer, EnerGov Application, EnerGov Application Server, EnerGov Services Server, EnerGov Database and DB Server, and Tyler Tech Project Sharepoint. If development can only be performed on City devices, additional effort may be required for development.

- Reports and forms will be developed within the best practices established by Tyler Technologies, SSRS, and Crystal Reports. If limitations exist in requested method of development (SSRS), then Crystal Reports may be utilized to meet the requests of the reports/ forms requirement after approval from the City's project manager is given.

- Configuration will be performed based on approved reports and forms specifications uploaded into Tyler Tech Sharepoint. If any changes are required or requested beyond the documentation in the approved specifications, City will be responsible to track these as change requests. PCG may provide configuration changes based on the report estimates and hourly rates provided in Section F.

- Undevelopable items – Specifications are based on the EnerGov system and database available at the time of PCG's configuration work and will have the ability to enable the approved specifications. Any intended configuration that is not configured and results in delays of completing report and form development at the time report and form development has begun, may be excluded from the report and form development and result in a change order for additional report and form development. Additionally, if requested report / forms functionality is not available in SSRS, Crystal Reports, and/or

Tyler Technologies systems, then report/ form may be descoped from development.

- Incomplete specifications – Any gaps in approved specifications that prevent configuration completion may result in a change order for report and form development.

- Conflicting configuration and development work – Tyler Tech and City activities in the EnerGov system will not conflict with the PCG's report and form development work. Any rework created by conflicting report and form development work, such-as updates/ changes/ overwriting Business Process components and/or developed report and form development work by the City or Tyler Tech. The City may request rework to be completed by PCG based on the hourly rates provided in Section F.

- Dependent Global Configuration and Sprint 1 & 2 Configuration - The City and Tyler Tech are responsible for the configuration and setup of global configuration listed in Client Questionnaire Results > Department = All Department and the planned Sprint 1 & Business Processes (provided on Feb 24, 2022). Global Configuration and Sprint 1 & 2 configuration that the report specifications are dependent on will be complete by the time PCG begins report and form development activities. Any gaps in required configuration that prevent PCG's report and form development completion may impact timeline to complete reports and forms and result in a change order for report and form development.

- Existing Configuration Clean-up – PCG will not be responsible for clean-up of existing configuration created by Tyler Tech or the City to complete report and form development. The City may request clean-up to be completed by PCG based on the hourly rates provided in Section F.

- Status meetings will be scheduled on an ad-hoc basis with the City as configuration progress is made. PCG will not be required to attend Tyler Tech meetings and other project meetings.

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F. Total not-to-exceed budget and duration of services:

- Total Not to Exceed: $171,000 (est. $2,850 per report). PCG will work with the City to select 60 reports from Attachment 2.
- Duration of Services**:** April 19, 2022 – December 31, 2024
- PCG's services are proposed with a time and materials compensation approach and reports and forms development services will be considered based on the established hourly rates below and report estimates:

PCG Resources		2022-23 Rates
LMS Configuration & Report Development	LMS Principal Consultant	$225/ hour
	LMS Lead Functional Consultant	$195/ hour
	LMS Functional / Configuration Consultant	$175/ hour
	Reports / Stored Procedure Developer	$175/ hour
GIS	GIS Principal Consultant	$195/ hour
	GIS Senior Consultant	$175/ hour
	GIS Consultant	$150/ hour
Server/ Network	Server/ Network Principal Consultant	$195/ hour
	Server/ Network Consultant	$175/ hour
	Server/ Network Technician	$150/ hour

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ATTACHMENT 2

Report Tracker

PCG will be responsible for the completion of 60 of the following Report Tracker items identified in the Tyler Tech EnerGov Project Sharepoint Site – Report Tracker. The original (first) 'Final-signed' .pdf specifications document attachment will be the reference source for the report and form development.

ID	Report/ Form Title	Description	Department	Project Priority
1	Special Event Permit	Parks and Recreation permit for special events.	Parks and Recreation	1 - High
2	Film Permit	Film Permit	Transportation	1 - High
3	Operators Permit	Operators Permit	Finance	3 - Low
4	Renewal Notice	First Renewal Letter	Finance	1 - High
5	Past Due Renewal Notice	Second Renewal Notice	Finance	1 - High
6	Delinquent- Final Renewal Notice	Final renewal notice	Finance	1 - High
7	Bingo Permit	Bingo Permit	Finance	3 - Low
8	Christmas Tree Lot/Fire Work stand permit	Christmas Tree Lot/Fire Work stand permit	Finance	3 - Low
9	Business Report	Permit Time Tracking Report	Finance	3 - Low
10	Solicitation Permit	Permit Snapshot Report, Standard Permit License	Finance	3 - Low
11	Approved Applicants - List of all approved permits by year	Project Listing	Finance	3 - Low
12	Business License	Standard Business License	Finance	1 - High
13	Professional License	Professional License	Finance	3 - Low
14	Operational Permit	Operational Permit	Fire Safety	1 - High
15	FSEC - Permit	FSEC - Permit	Fire Safety	3 - Low
16	Inspection Card	Inspection Card	Fire Safety	3 - Low
17	Placard/Permit Card	Permit card	Fire Safety	3 - Low
18	Inspection Result/Correction List	Linked Permit Inspection History	Fire Safety	1 - High
19	Plan Review Comment Letter	Plan Check status	Engineering	3 - Low

ID	Report/ Form Title	Description	Department	Project Priority
20	Construction Access Permit	Construction access permit: Conditions can go under the description	Engineering	1 - High
21	Encroachment Permit	Encroachment Permit	Engineering	1 - High
22	Refund Form	Refund form Engineering	Engineering	3 - Low
23	Standard Condition Report	Conditions can go on this with the permit details on snapshot and the signature is on the standard permit license	Engineering	3 - Low
24	Annual WQMP Report by Approval and Inspection Date	Annual WQMP Report by Approval Date	Engineering	3 - Low
26	Information Card Charitable Solicitation	(Identification Card)	Finance	3 - Low
27	Storage Permit	Storage Permit	Engineering	3 - Low
28	Plan Review Letter	Plan Review Letter	Building	1 - High
29	30 Days to Plan Check Expiration	30 day plan check expiration	Building	1 - High
30	30 Days to Permit Expiration Notice	30 Days to Permit Expiration Notice	Building	1 - High
31	Certificate of Occupancy	Certificate of Occupancy	Building	1 - High
32	Temporary Certificate of Occupancy	Temporary Certificate of Occupancy	Building	1 - High
33	Fire Damage inspection report	Fire Damage Inspection Report	Building	3 - Low
34	Placard	Placard	Building	3 - Low
35	Change of Address Letter	Change of Address Letter	Planning & Zoning	1 - High
36	Zoning Verification Letter	Zoning Verification Letter	Planning & Zoning	1 - High
37	Withdraw Application Letter	Withdraw Application Letter	Planning & Zoning	1 - High
38	Second Story Notification	Second Story Notification	Planning & Zoning	1 - High
39	Land Use Restrictions	Land Use Restrictions	Planning & Zoning	3 - Low
40	Public Notice Certification form	Public Notice Certification form	Planning & Zoning	3 - Low
41	Extension Letter Granted	Extension Letter Granted	Planning & Zoning	3 - Low
42	Temporary Use Permit Approval Letter: Food Truck	Temporary Use Permit Approval Letter: Food Truck	Planning & Zoning	3 - Low

ID	Report/ Form Title	Description	Department	Project Priority
43	Temporary Use Permit Approval Letter: Outdoor Dinning	Temporary Use Permit Approval Letter: Outdoor Dinning	Planning & Zoning	3 - Low
44	Temporary Use Permit Approval Letter: Other Uses	Temporary Use Permit Approval Letter: Other Uses	Planning & Zoning	3 - Low
46	Inter Office Memo	Inter Office Memo	Code Enforcement	3 - Low
47	Office Conference – Prosecution	Office Conference – Prosecution	Code Enforcement	3 - Low
48	Incident Report Narrative	Incident Report Narrative	Code Enforcement	3 - Low
49	Violation Code Sheet	Violation Code Sheet	Code Enforcement	3 - Low
50	Contact Sheet	Contact Sheet	Code Enforcement	3 - Low
51	Incident Report Face Sheet	Incident Report Face Sheet	Code Enforcement	3 - Low
52	Live Entertainment Permit	Live Entertainment Permit	Code Enforcement	3 - Low
53	Live Entertainment Permit Expiration Notice	Live Entertainment Permit Expiration Notice	Code Enforcement	3 - Low
54	Live Entertainment Permit Renewal	Live Entertainment Permit Renewal	Code Enforcement	3 - Low
55	Notice to Proceed	Notice to Proceed	Code Enforcement	1 - High
56	Inspection Correction Notice	Building Inspection Correction Sheet/Notice	Building	1 - High
57	Plan Check Extension Letter	Plan Check Extension Letter	Building	1 - High

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AUTOMATIONS CONFIGURATION:

Duration of services: April 19, 2022 – December 31, 2024

G. Park Consulting Group is responsible for the following tasks related to the completion of configuration and development detailed in Attachment 1:

- PCG will be responsible for the configuration of the Automation (Intelligent Object) items identified in Attachment 3, from the Tyler Tech EnerGov Project Sharepoint Site – Automation Tracker. The original (first) 'Final-signed' Automation Questionnaire .pdf attachments for each Automation Tracker item will be the sole reference source for the configuration. Configuration will be performed in EnerGov v2021.

- PCG will facilitate reviews with the City's functional leads who are responsible to validate configuration that matches the Automation Questionnaires.

- PCG will resolve configuration corrections identified by the City's functional leads based on non-matching configuration in comparison to the Questionnaires.

- PCG will facilitate reviews for correction validation with the City's functional leads who are responsible to validate configuration that matches the Automation Questionnaires.

H. Key Assumptions

- City will provide a primary project contact available daily throughout the duration of services to successfully deliver PCG services. If the primary project contact is not available for a particular day, a back-up will be provided by the City.

- City will provide process leads and subject matter experts to serve as project team members that are sufficiently available throughout the duration of services to successfully deliver PCG services in a timely, efficient, and productive manner.

- In order to meet timelines, City SMEs will answer questions and provide feedback and responses in a timely manner (within 2 business days).

- City estimates PCG should have the full ability to deliver the project remotely with no on-site visits and/ or incurred travel costs. If travel is required, PCG will seek approval from the City on travel expense reimbursement.

- Remote access and full system administrator access to EnerGov will be needed upon the start of work. This includes, and is not limited to, access to VPN/virtual desktop logins, Google Chrome and Internet Explorer, EnerGov Application, EnerGov Application Server, EnerGov Services Server, EnerGov Database and DB Server, and Tyler Tech Project Sharepoint.

- Configuration will be performed based on approved Automation Questionnaires identified as Intelligent Objects (in scope inventory provided in Attachment 3). If any changes are required or requested beyond the documentation in the Automation Questionnaires, City will be responsible to track these as change requests. PCG may provide configuration changes based on the hourly rates provided in Section I.

- Unconfigurable items – Automation Questionnaires are based on the EnerGov system available at the time of PCG's configuration work and will have the ability to enable the functionality as specified in the Automation Questionnaires. Any functionality that is not able to be configured based on best practices and/or results in system errors will be excluded.

- Incomplete specifications – Automation Questionnaires are complete and considered configurable by the City and Tyler Tech. Any gaps in specifications that prevent configuration completion may result in a change order.

- Conflicting Configuration Work – Tyler Tech and City activities in the EnerGov system will not conflict with the PCG's configuration work. Any rework created by conflicting configuration work, such-as updates/ changes/ overwriting, will exclude the applicable Business Process and Automation components as required for milestone sign-off. The City may request rework to be completed by PCG based on the hourly rates provided in Section I.

- Dependent Global Configuration and Sprint 1 & 2 Configuration - The City and Tyler Tech are responsible for the configuration and setup of global configuration listed in Client Questionnaire Results > Department = All Department and the planned Sprint 1 & Business Processes (provided on Feb 24, 2022). Global Configuration and Sprint 1 & 2 configuration that the Automation Questionnaires are dependent on will be complete by the time PCG begins configuration activities. Any gaps in required configuration that prevent PCG's configuration completion may result in a change order.

- Existing Configuration Clean-up – PCG will not be responsible for clean-up of existing configuration created by Tyler Tech or the City to complete configuration work. The City may request clean-up to be completed by PCG based on the hourly rates provided in Section I.

- Status meetings will be scheduled on an ad-hoc basis with the City as configuration progress is made. PCG will not be required to attend Tyler Tech meetings and other project meetings.

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I. Total not-to-exceed budget and duration of services:

    a. Total Not to Exceed: $43,750 (est. $875 per automation) PCG will work with the City to select 50 Automations (Intelligent Objects) from Attachment 3.

    b. Duration of Services**:** April 19, 2022 – December 31, 2024

    c. PCG's services are proposed with a time and materials compensation approach and automations services will be considered based on the established hourly rates below and automation estimates:

PCG Resources		2022-23 Rates
LMS Configuration & Report Development	LMS Principal Consultant	$225/ hour
	LMS Lead Functional Consultant	$195/ hour
	LMS Functional / Configuration Consultant	$175/ hour
	Reports / Stored Procedure Developer	$175/ hour
GIS	GIS Principal Consultant	$195/ hour
	GIS Senior Consultant	$175/ hour
	GIS Consultant	$150/ hour
Server/ Network	Server/ Network Principal Consultant	$195/ hour
	Server/ Network Consultant	$175/ hour
	Server/ Network Technician	$150/ hour

Optional Task

The completion of additional reports and automations may be added to this contract for an amount not to exceed $76,250. All additional reports and automations will be estimated per the rates identified within this proposal; $2,850 per Report and $875 per Automation.

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ATTACHMENT 3

Automation Tracker - Configuration Inventory

PCG will be responsible for the completion of 50 selected Intelligent Objects from the Automation Tracker items identified in the Tyler Tech EnerGov Project Sharepoint Site – Automation Tracker. The original (first) 'Final-signed' .pdf attachment will be the reference source for the configuration.

ID	Priority	Title
1	3 - Low	Change status to Planner Assigned
2	3 - Low	Change status to Application Returned
3	3 - Low	Change status to In Review- Multiple
4	3 - Low	Change status to Application Complete - multiple
5	3 - Low	Change status to Additional Info Required
6	3 - Low	Change status to Continued to Specified Date (Planning Commission)
7	3 - Low	Change status to Continued to Unspecified Date (Planning Commission)
8	3 - Low	Change status to Continued to Specified Date (City Council Hearing)
9	3 - Low	Change status to Continued to Unspecified Date (City Council Hearing)
10	3 - Low	Change status to Continue to City Council
11	3 - Low	Notification to Planner - Change status of Plan Case (City Council Action)
12	3 - Low	Notify Planner about Review Expiration
13	3 - Low	Change status to Application Submitted
14	3 - Low	Change status to Application Complete- Multiple screening
15	3 - Low	Change status to Additional Info Required – Multiple Screening
16	3 - Low	Change status to Preparing for Decision Date
17	1 - High	Email/Change status to Public Hearing Date Scheduled
18	3 - Low	Change Status to Continue to City Council
19	2 - Medium	EMAIL – Receipt of Application (Includes Reports)
20	2 - Medium	EMAIL – Pay Invoice (Includes Reports)
21	3 - Low	Change status to Scheduled for Decision
22	3 - Low	Plan Check Expiration – Change status
23	3 - Low	Plan Check Expiration – Alert building staff
24	1 - High	Plan Check Expiration – Send 30 days to Plan Check Expiration letter (Plan Check)
25	2 - Medium	Automatic email invoice to billing contacts (Includes Reports)

ID	Priority	Title
26	3 - Low	Change status to Review Expired
27	3 - Low	Change status to Allowed to Proceed
28	3 - Low	Change status to Continued
29	3 - Low	Change status to In Appeal Period
30	3 - Low	Notify Planner Appeal Period has ended
31	3 - Low	Notify Planner - Change status to Appealed/Called up for Review
32	2 - Medium	Automatically email Receipt of Application (Includes Reports)
33	2 - Medium	Automatically email invoice (Includes Reports)
34	2 - Medium	Automatically email Decision Date (Includes Reports)
35	3 - Low	Change status to Public Hearing Date Scheduled-
36	3 - Low	Automatically change status to Approval Expired
37	3 - Low	Automatically change status to Complete
38	3 - Low	Change status to In Review
39	3 - Low	Change status to Preparing for Decision Date*
40	1 - High	Email/Change status to Public Hearing Date Scheduled* (Includes Reports)
41	3 - Low	Change status to Public Hearing Date Scheduled- City Projects
42	3 - Low	Change status to Continued to Unspecified Date (Planning Commission)-
43	1 - High	Change the status of the license record to Renewal on the first of the month of the license expiration month and the license has not been renewed.
44	1 - High	Change the status of the license record to Past Due if 2 months and 15 days elapses past the expiration date and the license has not been renewed.
45	1 - High	Change the status of the license record to Delinquent if 3 months and 15 days elapses past the expiration date and the license has not been renewed.
46	1 - High	Email past due document and attach to email to licensee if 2 months and 15 days elapses past the expiration date and the license has not been renewed. (Includes Reports)
47	1 - High	Email delinquent document and attach to email to licensee if 3 months and 15 days elapses past the expiration date and the license has not been renewed. (Includes Reports)
48	3 - Low	Change status of contractor license for inside CM
49	3 - Low	Change status of contractor license for outside CM contractor
50	3 - Low	Notify finance staff on overdue
51	3 - Low	Email a notification to designated Planning staff if their reviews (tasks) are overdue
52	1 - High	Email business license report (Includes Reports)

ID	Priority	Title
53	2 - Medium	Notify designated staff when specified tasks are assigned in the workflow
54	3 - Low	Change the status of the license record to issued when the Issue License workflow action is passed.
55	2 - Medium	Email the Business License report to all contacts on the business license record when the Issue License workflow action is passed. (Includes Reports)
56	1 - High	Change the status of the license record to Closed if 1 year elapses past the expiration date and the license has not been renewed.
57	2 - Medium	Email the applicant that a previous application has been closed and in order to proceed with application they will need to pay the previous year's fees. (Includes Reports)
58	2 - Medium	Email 60 days prior to expiration date advising him/her that they must apply for a new license/permit prior to 30 days before expiration date.(Includes Reports)
59	3 - Low	Change status to In Appeal Period- Multiple DRC-WTUP
60	3 - Low	Notification to Planner- multiple
61	3 - Low	Change status to Preparing for Decision Date-DRC Review-WTUP
62	3 - Low	Change status to Additional Info Required-OTC
63	3 - Low	Change status to Preparing for Decision Date
64	3 - Low	Change status to Continued- Planning Commission-WTUP
65	3 - Low	Change status to In Appeal Period- Planning Commission
66	3 - Low	SET VALUE: Permit Status to 'Complete'
67	3 - Low	Plan Check Expiration – Auto populate date
68	1 - High	Email/Change status to Public Hearing Date Scheduled- Screening (Includes Reports)
69	3 - Low	Change status to Review Expired- Screening
70	3 - Low	Notification to Planner/Users
71	3 - Low	Change status to Application Complete- Zoning
72	3 - Low	Change status to In Appeal Period
73	3 - Low	Plan Check Expiration – Auto populate
74	1 - High	Plan Check Expiration – Change status
75	1 - High	Plan Check Expiration – Alert building Automatically send an email to designated building staff if the permit record is within 30 days of the staff
76	2 - Medium	Automatic email invoice to billing contacts (Includes Reports)
77	3 - Low	Change status to Application Submitted- Cannabis Business Permit
78	3 - Low	Change status to In Review- Cannabis Business Permit
79	3 - Low	Change status to In Appeal Period- Cannabis Business Permit

ID	Priority	Title
80	3 - Low	Automatically change status to NTP Issue
81	3 - Low	Automatically change status to CBP Denied
82	3 - Low	Automatically change status to Issued –
83	3 - Low	Automatically change status to Denied
84	3 - Low	Notify planner when Drywall inspection is complete
85	3 - Low	Automatically change status to Closed
86	2 - Medium	Automatically email permit to Police Department (Includes Reports)
87	3 - Low	Automatically notify staff when a transportation permit is submitted online
88	2 - Medium	Automatically email contacts when status of permit record is changed to Denied (Includes Reports)
89	2 - Medium	Automatically email external agencies
90	3 - Low	Automatically notify staff when a Single Event (Fire) permit is applied for
91	1 - High	Plan Check Expiration
92	3 - Low	Update Final Expiration Date
93	3 - Low	Final Expire Permit
94	2 - Medium	Automatically email review comments to the owner, engineer, and/or surveyor when the reviews are complete (Includes Reports)
95	2 - Medium	Automatically notify designated Planning staff when the Planning Commission and/or City Council hearing are scheduled
96	2 - Medium	Email notification applicant 30 days prior to permit expiration. (Includes Reports)
97	1 - High	Plan Approved Expired
98	3 - Low	Automatically change the status of the permit record to Final when the Close Permit workflow action is passed (turned green).
99	3 - Low	Agreement recording alert/reminders
100	3 - Low	Email people assigned to reviews
101	3 - Low	Update Expiration Date
102	3 - Low	Application Expiration
103	3 - Low	Automatically change the status of the permit record to Plan Approval Expired if it is not issued within 2 weeks of the apply date.
104	3 - Low	Automatically notify designated City Staff when the permit is issued.
105	2 - Medium	Automatically change the status of the permit record to Plan Approval Expired if 360 days elapses from the date in the inherent Apply Date field and the permit record is still in a status of In Review, Submitted, or Submitted - Online.

ID	Priority	Title
106	3 - Low	Permit Expiration – Auto populate date
107	1 - High	Permit Expiration - 30 days to Permit Expiration Notice (Includes Reports)
108	1 - High	Expiration/warning notice
109	2 - Medium	Extend expiration date 180 days after approved inspection
110	2 - Medium	Permit Expiration Extension (inspections)
111	1 - High	Non-residential Permit Expiration – Auto populate date
112	1 - High	Residential Permit Expiration – Auto populate date
113	1 - High	Permit Expiration – Auto populate date
114	1 - High	Set expiration date on permit issuance
115	3 - Low	Permit Expiration - Alert Building Staff
116	2 - Medium	Automatically email the job card (Includes Reports)
117	2 - Medium	EMAIL: Send Inactivity Report (Includes Reports)
118	3 - Low	EMAIL/NOTIFICATION: Citation on Hold (Includes Reports)
119	3 - Low	SET VALUE: Set Code Case Status to 'In Compliance
120	2 - Medium	EMAIL: Send 45 Expiration Letter to the applicant when the permit is 45 days from expiration. (Includes Reports)
121	2 - Medium	EMAIL: Send 60 Expiration Letter to the applicant when the permit is 45 days from expiration (Includes Reports)
122	3 - Low	Set Value: Change status to 'Complete' when Case Closeout action is passed.
123	1 - High	EMAIL: Email a copy of the Live Scan Form to the applicant when the 'Issue Request for Live Scan Form' is passed. Reminder to applicant to upload signed copy.
124	3 - Low	EMAIL: When a new document has been uploaded to CSS. Notify the Assigned To. If possible, notify when the 'Signed Live Scan Form' file category is uploaded.
125	3 - Low	Set Value: Change License Status to Passed if Case Closeout action is passed.
126	3 - Low	Set Value: Change License Status to Failed if Case Closeout action is Failed.
127	2 - Medium	EMAIL: Send Notification Reminder to Applicant 10 days after 'Issue Request for Live Scan Form' action is passed if 'Confirm Completed Live Scan' action is not initiated.
128	3 - Low	HOLD: Place a hold on any Renewals pending the status of the business's Cannabis Business Permit application. Hold will be manually removed if okay to proceed.
129	3 - Low	Change status to Planner Assigned
130	3 - Low	Change status to Application Returned
131	3 - Low	Change status to In Appeal Period
132	2 - Medium	EMAIL: Send Hearing Date Letter document to Applicant when 'Violator Notified of Hearing' action is completed. It is in two separate steps. (Includes Reports)

ID	Priority	Title
133	2 - Medium	EMAIL: Send Continuance of Hearing Date document to Applicant when 'Violator Requests Extension' action is completed. It is in two separate steps. (Includes Reports)
134	2 - Medium	EMAIL: Send Financial Hardship Letter document to applicant when the 'Financial Hardship Hearing' has a status of 'Granted' or 'Denied'. The report will be dynamic based on the decision made. (Includes Reports)
135	2 - Medium	EMAIL: Send Notice of Decision document to applicant when the 'Citation Contest Administrative Hearing' has a status of 'Approved' or 'Denied'. The report will be dynamic based on the decision made. (Includes Reports)
136	3 - Low	SET VALUE: Plan status to 'Complete' when the Close Case action has been passed.
137	3 - Low	Change status to Processed for plan case Pre-Application Review