Resolution No. 2024-3230

A Resolution of the City of Sanford, Florida, amending the City's annual operating budget for the fiscal year beginning October 1, 2023 and ending September 30, 2024; providing for implementing administrative actions; providing for a savings provision; providing for conflicts; providing for severability and providing for an effective date.

Whereas, the Commission of the City of Sanford, Florida has adopted an annual operating budget for the fiscal year beginning October 1, 2023 and terminating on September 30, 2024 specifying certain projected revenues and expenditures for the operations of Sanford municipal government; and

Whereas, the City's budget presumes that each department generally will, to the best of their ability, maintain its expenditures within its allocated budgeted level and exercise prudence in expending funds during the course of the City's fiscal year; and

Whereas, from time-to-time circumstances and events may require that the original City budget may need revision; and

Whereas, the City Commission, in its judgment and discretion, has the authority to adjust the budget to more closely coincide with actual and expected events.

Now, therefore, be it adopted and resolved by the City Commission of the City of Sanford, Florida as follows:

Section 1. Adoption of Budget Amendment.

The annual operating budget of the City of Sanford for the fiscal year beginning October 1, 2023 and terminating on September 30, 2024 is hereby revised and amended by Attachment "A". The Attachment is hereby incorporated into this Resolution as if fully set forth herein verbatim. Except as amended herein, the annual operating budget for the City of Sanford for fiscal year beginning October 1, 2023 and terminating on September 30, 2024 shall remain in full force and effect.

Section 2. Implementing administrative actions.

The City Manager, or designee, is hereby authorized and directed to implement the provisions of this Resolution by means of such administrative actions as may be deemed necessary and appropriate.

Section 3. Savings.

The prior actions of the City of Sanford relating to the adoption of the City budget and related activities are hereby ratified and affirmed.

Section 4. Conflicts.

All resolutions or parts of resolutions in conflict with this Resolution are hereby repealed.

Section 5. Severability.

If any section, sentence, phrase, word, or portion of this Resolution is determined to be invalid, unlawful or unconstitutional, said determination shall not be held to invalidate or impair the validity, force or effect of any other section, sentence, phrase, word, or portion of this Resolution not otherwise determined to be invalid, unlawful, or unconstitutional.

Section 6. Effective Date.

This Resolution shall become effective immediately upon enactment.

Passed and adopted this 25th day of March, 2024.

Attest:

Traci Houchin MMC, FCRM

Traci Houchin, MMC, FCRM
City Clerk

City Commission of the City of Sanford

Art Woodruff, Mayor

For use and reliance of the Sanford
City Commission only.
Approved as to form and legality.

William L Colbert

William Colbert, City Attorney

ATTACHMENT A
REQUEST FOR BUDGET AMENDMENT

Fiscal Year 23/24

Department: Development Services **Division:** Building Division 2/27/2024

CHANGES IN REVENUES

REVENUE ACCOUNT NUMBER Fund		Revenue	Act Cd	Ele	Project #	Revenue Account Title	Current Budget	Current Balance	Amount of Change	Adjusted Unrealized
135	0000	389	98	00		Building Reserve	$ 46,045	$ 46,045	$ 72,560	

TOTAL CHANGES IN REVENUES $ 72,560

CHANGES IN EXPENDITURES

EXPENDITURE ACCOUNT NUMBER Fund	Dpt/Div	Activity	Obj	Ele	Project #	Expenditure Account Title	Current Budget	Current Balance	Amount of Change	Remaining Balance
135	1114	524	46	00		Repair & Maintenance Services	$ 177,864	2,229	72,560	

TOTAL CHANGES IN EXPENDITURES $ 72,560

REASON FOR AMENDMENT: to pay for the continued implementation of Central Square

DIRECTOR APPROVAL: [signature] **DATE:** 3-3-24

FINANCE APPROVAL: Cynthia Lindsay **DATE:** 3/4/24

CITY MANAGER APPROVAL: [signature] **DATE:** 3-4-2024

CITY COMMISSION AGENDA DATE: 3/25/24 **APPROVED** Y

FOR FINANCE USE

Entry Date: ______ **Batch Number:** ______ **Document #:** BA 05-/23

CITY OF
SANFORD
FLORIDA

Larger attachments are available in the City Clerk's Office for review.

WS __ RM _X_

Item No. 8.C

CITY COMMISSION MEMORANDUM 24-091
MARCH 25, 2024 AGENDA

APPROVED

TO:	Honorable Mayor and Members of the City Commission
PREPARED BY:	Angela Adkins, Administrative Support Supervisor Development Services
SUBMITTED BY:	Norton N. Bonaparte, Jr., ICMA-CM, City Manager
SUBJECT:	Resolution No. 2024-3230 for Building Reserve Fund

STRATEGIC PRIORITIES:

- ☐ Unify Downtown & the Waterfront
- ☐ Promote the City's Distinct Culture
- ☐ Update Regulatory Framework
- ☐ Redevelop and Revitalize Disadvantaged Communities

SYNOPSIS:

Approval of Resolution No. 2024-3230, to amend the budget in an amount of $72,560, to increase the Building Funds Repair and Maintenance account and to increase the purchase order #39112 is being requested

FISCAL/STAFFING STATEMENT:

Funds are available in the Building Funds reserve account.

BACKGROUND:

The Department is requesting a transfer of $72,560 and to increase Purchase Order #39112 for the continued project management, consulting, configuration, testing, training, and other services work necessary for the implementation of the Central Square database, bringing the new total to $355,060. Implementing Central Square to replace Citizenserve would bring conformity and unification within all of the departments, increase the efficient processing of permitting, and enhance our accounting processes.

LEGAL REVIEW:

No legal review requested of the City Attorney.

RECOMMENDATION:

It is Staff's recommendation that the City Commission approve Resolution No. 2024-3230, to amend the budget $72,560 and increase purchase order #, bringing the new total to $355,060.

Suggested Motion:

"I move to approve Resolution No. 2024-3230, to amend the budget in an amount of $72,560 and increase the purchase order #39112, bringing the new total to $355,060."

Attachments: Resolution No. 2024-3230
Purchase Order #39112

PURCHASE ORDER

DATE: 01/30/23
FACSIMILE: 407-688-5021

CITY OF SANFORD FLORIDA

FLORIDA TAX EXEMPT
NO.: 858012621681C-8

PO NUMBER: 039112

SUBMIT INVOICES TO:
INVOICE_DS@SANFORDFL.GOV

VENDOR NO.: 12634

TO:

CENTRALSQUARE TECHNOLOGIES, LL
1000 BUSINESS CENTER DR
LAKE MARY, FL 32746

SHIP TO:

CITY OF SANFORD
300 N. PARK AVENUE- CE
SANFORD, FL 32771

DELIVER BY	TERMS	F.O.B. DESTINATION UNLESS OTHERWISE INDICATED	BID OR QUOTATION NO.	REQUISITION NO.
01/05/23	NET/30			70196

ACCOUNT NO.: 135-1114-524.46-00 **PROJECT NO.:**

NO DEVIATION FROM THIS PURCHASE ORDER WILL BE ALLOWED UNLESS AUTHORIZED BY THE PURCHASING MANAGER - CITY OF SANFORD

ITEM NO.	DESCRIPTION	QUANTITY	UNIT OF ISSUE	UNIT COST	EXTENDED COST
1	SUBSCIPRTION AND MAINTENANCE FOR DATABASE startup system VENDOR ITEM NO.- 12634	282500.00	NA	1.00	282500.00
			SUB-TOTAL		282500.00
			TOTAL		282500.00

APPROVED BY: M Ordonez
PURCHASING AGENT

APPROVED BY: Craig M. Radzak
CITY MANAGER

All packages and Invoices applicable to this P.O. must bear this P.O. Number. The Vendor shall comply with all specified and reference herein before and after. Any attempts to insert language to change these terms and conditions are hereby rejected and will be resolved in favor of the City of Sanford. Standard terms and conditions hereby incorporated into this purchase order may be found at http://www.sanfordfl.gov/index.aspex?page=879

PURCHASE ORDER TERMS AND CONDITIONS

1. By accepting this Purchase Order (PO) the Vendor accepts all of the Terms and Conditions included herein. The Buyer is the City of Sanford, Florida, hereinafter referred to as the "City". The term "City" is used in a broad sense to include its employees, directors, officers, agents, volunteers, etc.
2. All information referenced is hereby incorporated into the PO. These Terms and Conditions may be varied only by written amendment signed by the parties. All modifications in performance, including but not limited to, extensions of time, renewal, or substitution are void absent dually signed amendment by the parties. Time is of the essence of the lawful performance of the duties and obligations contained in the Purchase Order. The Vendor agrees that Vendor shall diligently and expeditiously pursue Vendor's obligations.
3. Cancellation rights reserved by the City. The City may cancel this PO in whole or in part at any time for default by written notice to the Vendor. The City shall have no liability to the Vendor beyond payment of any balance owing for Material purchased hereunder and delivered to and accepted by the City prior to the Vendor's receipt of the notice of termination.
4. Terms of shipping are F.O.B. the City's delivery location unless otherwise noted within the terms of this PO. Regardless of the indicated F.O.B. point, the City does not accept title until the delivery is acknowledged by an authorized City representative.
5. Prices stated on this PO are firm, all inclusive and consistent with applicable negotiations, bid(s) and/or quotations. The City is exempt from the Florida Sales and Use Tax and will furnish the Vendor with proof of tax exemption upon request. Extra charges for any purpose will not be allowed unless explicitly indicated on the PO. This order is hereby cancelled, if pricing is omitted.
6. The Vendor warrants that any material or equipment supplied hereunder is new, unused condition and free from defects in title, workmanship, defects in design and in full compliance with the specifications defined by the City in the order. The goods or services furnished under this PO are covered by commercial warranties for such goods or services and that the rights and remedies provided therein are in addition to and do not limit those available to the City. A copy of these warranties and all applicable manufacturers warranties shall be furnished at the time of delivery.
7. The City reserves the right to conduct any inspection or investigation to verify compliance of the goods and/or services with the requirements of this purchase order and to reject any delivery not in compliance If any deficiency is not visible at the time of delivery the City reserves the right to take and/or require appropriate corrective action upon the discovery of any deficiency, non-compliance, or defect.
8. All tools or property furnished to the Vendor by the City shall remain the property of the City, be subject to removal upon the City's demand, be used only on behalf of the City, be maintained in good order, and be clearly identified as property of the City. The Vendor assumes any and all liability of whatsoever type or nature for loss or damage to such property.
9. The Vendor agrees to comply with all Federal, State of Florida, Seminole County, City laws, ordinances, regulations, authority and codes and authority having jurisdiction over the purchase.
10. To the fullest extent permitted by law, the Vendor shall indemnify, hold harmless and defend the City, its agents, servants, officers, officials and employees,or any of them, from and against any and all claims, damages, losses, and expenses including, but not limited to, attorney's fees and other legal costs such as those for paralegal, investigative, and legal support services, and the actual costs incurred for expert witness testimony, arising out of or resulting from the performance or provision of services required under this Agreement, provided that same is caused in whole or in part by the error, omission, act, failure to act, breach of contract obligation, malfeasance, officers, officials,employees, or agents. Additionally, the Vendor accepts responsibilityfor all damages resulting in any way related to the procurement and delivery of goods or services contemplated in this purchase order. Nothing herein shall be deemed to affect the rights, privileges, and immunities of the City as set forth in Section 768.28, Florida Statutes.
11. The Vendor shall not assign this PO, any rights under this PO or any monies due or to become due hereunder nor delegate or subcontract any obligations or work hereunder without the prior written consent of the City.
12. The Vendor shall not disclose the existence of this PO without prior written consent of the City except as may be required to perform this PO.
13. All Material purchased hereunder must be packaged to ensure its security and delivery in accordance with the City's shipping and packaging specification and good commercial practice. Each package shall be labeled indicating the addressee of each package or shipment and the applicable PO number. All shipmentsshall comply with HAZMAT requirements including, but not limited to, (DOT) regulations published in 49CFR 1399, OSHA regulations 29 CFR 4999.
14. The Vendor shall perform the obligations of this PO as an independent contractor and under no circumstances shall it be considered as agent or employee of the City.
15. The Vendor ensures that its personnel shall comply with reasonable conduct guidelines and City policies and procedures.
16. After each delivery, the Vendor shall provide to the bill to address an original, proper invoice (single copy) which includes: a) Vendor's name(dba), telephone number, mailing address; b) City's P.O. Number; c) Date of invoice; d) Shipping date; e) Delivery date; f) Payment terms; g) Description of goods/services; h) quantity; i) Unit price; j) Extended price; k) Total. The City has the right to reconcile invoice with the PO and adjust payment accordingly to comply with the PO. Payment will be made only to the Vendor identified on the PO and for received and accepted goods/services. The City shall have right at any time to set-off any amounts due to the Vendor against any amounts owed to the City by the Vendor and shall in the case of Vendor default retain the right to further adjust payments as consistent with the best interests of the City.
17. Payment of invoices will be in compliance with Chapter 218, Part VII of Florida Statutes, City Ordinance No. 3029, Purchasing Policy of the City and the stipulations, terms and conditions of this PO. Any cash discount period will date from receipt of invoice, receipt of actual delivery or date of invoice, which ever is later.
18. If this PO involves the Vendor's performance on the City's premises or at any place where the City conducts operations, the Vendor shall request information from the Purchasing Manager regarding insurance coverage requirements. In circumstances where insurance is required, Vendor shall provide proofs of insurance required by the City, or City reserves the right to cancel this Purchase Order, immediately suspend performance by the Vendor atVendor's expense and prohibit access to City premises until such proofs of insurance is verified. Noncompliance with this item shall place the Vendor in default and subject to disbarment from the City's Vendor List.
19. The failure of the city to enforce any provision of this PO, exercise any right or privilege granted to the City hereunder shall not constitute or be construed as a waiver of any such provision or right and the same shall continue in force.
20. The Vendor shall notify the Purchasing Manager of any inherent hazard and applicable precautions, protective measures and provide any additional relevant information, including MSDS, related to the Material being purchased herein.
21. The City shall have the right at no additional charge to use all or portions of material found in the Vendor's applicable literature relevant to the purchase. The Vendor agrees to advise the City of any updated information relative to the foregoing literature and documentation with timely written notice.
22. A person or affiliate who has been removed from the City's Vendor List may not submit a bid or transact business with the City in excess of Category Two for a period of thirty-six (36) months from the date of being removed from the City's Vendor List.
23. In compliance with 8 U.S.C. Section 1324a(e) [Section 274A(e) of the Immigration and Nationality Act (INA)], the City will not intentionally make an award or upon discovery of a violation will unilaterally cancel this PO with any contractor who knowingly employs unauthorized alien workers.
24. This PO shall be governed by and interpreted in accordance with the laws of the State of Florida.
In any action or proceeding required to enforce or interpret the terms of this Agreement, venue shall be of the Eighteenth Judicial Circuit in and for Seminole County, Florida

Purchasing Division
Requisition Form

CITY OF SANFORD FINANCE DEPARTMENT

City of Sanford
PO Box 1788
Sanford, FL
Seminole
32772
Phone: 407-688-5030
Fax: 407-688-5021
Email:
purchasing@sanfordfl.gov
www.sanfordfl.gov

Department Development Services

Contact Person Angela Adkins

Vendor CentralSquare Technologies

Address 1000 Business Center Drive Lake Mary Fl 32746

Contact Person Johnny Rivera

Tel 407-748-0167 **Email** jonathan.rivera@centralsquare.com

Requisition# 70196 **PO #** **Date** 1-5-23

Line Item	Account Code	Description	Quantity Unit	Extended Price
	135-1114-524-46-00	Subscription, Startup and Maintenance		282,500.00
		for Database system for Development Services		
		Building, Code, Planning for the 1st year		

Delivery Instructions:

Additional Comments:

Quote Q97329

Finance Manager Budget Transfer

Override Accounts (initials)

Internal Use Only

Amount Paid	Check No.	Date

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 12/27/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MARSH USA, INC. TWO ALLIANCE CENTER 3560 LENOX ROAD, SUITE 2400 ATLANTA, GA 30326 CN130114897-EO/C-GAWU-22-23	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
INSURED CentralSquare Technologies, LLC Superion, LLC TriTech Software Systems 1000 Business Center Dr. Lake Mary, FL 32746	

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : The Charter Oak Fire Insurance Co.	25615
INSURER B : Phoenix Insurance Company	25623
INSURER C : Travelers Property Casualty Company Of America	25674
INSURER D : Travelers Casualty And Surety Company	19038
INSURER E : AIG Specialty Insurance Company	26883
INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** ATL-005483070-05 **REVISION NUMBER:** 2

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: [X] POLICY [ ] PRO-JECT [ ] LOC OTHER:	X		H-630-6S758660-COF-22	08/31/2022	08/31/2023	EACH OCCURRENCE	$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 1,000,000
							GENERAL AGGREGATE	$ 2,000,000
							PRODUCTS - COMP/OP AGG	$ 2,000,000
								$
B	AUTOMOBILE LIABILITY [ ] ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [X] HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY	X		BA-6S783539-22-I3-G	08/31/2022	08/31/2023	COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
							BODILY INJURY (Per person)	$
							BODILY INJURY (Per accident)	$
							PROPERTY DAMAGE (Per accident)	$
								$
C	[X] UMBRELLA LIAB [ ] OCCUR EXCESS LIAB [ ] CLAIMS-MADE DED [X] RETENTION $ 10,000	X		CUP-6S801390	08/31/2022	08/31/2023	EACH OCCURRENCE	$ 10,000,000
							AGGREGATE	$ 10,000,000
								$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [N] (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		UB-6S783668-22-I3-G	08/31/2022	08/31/2023	[X] PER STATUTE [ ] OTH-ER	
							E.L. EACH ACCIDENT	$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	$ 1,000,000
E	E&O/Cyber			015930626	09/30/2022	08/31/2023	Limit	5,000,000
							SIR	1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificate Holder, its officers and employees are included as additional insured (except workers' compensation) where required by written contract. This insurance is primary and non-contributory over any existing insurance and limited to liability arising out of the operations of the named insured subject to policy terms and conditions.

All policies, except for professional liability policies and workers compensation policies shall name the City of Sanford as Additional Insured.

CERTIFICATE HOLDER	CANCELLATION
City of Sanford 300 North Park Ave Sanford, FL 32771	**SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.** AUTHORIZED REPRESENTATIVE of Marsh USA Inc. John Whittle

Resolution No. 3104

A Resolution of the City of Sanford, Florida, amending the City's annual operating budget for the fiscal year beginning October 1, 2022 and ending September 30, 2023; providing for implementing administrative actions; providing for a savings provision; providing for conflicts; providing for severability and providing for an effective date.

Whereas, the Commission of the City of Sanford, Florida has adopted an annual operating budget for the fiscal year beginning October 1, 2022 and terminating on September 30, 2023 specifying certain projected revenues and expenditures for the operations of Sanford municipal government; and

Whereas, the City's budget presumes that each department generally will, to the best of their ability, maintain its expenditures within its allocated budgeted level and exercise prudence in expending funds during the course of the City's fiscal year; and

Whereas, from time-to-time circumstances and events may require that the original City budget may need revision; and

Whereas, the City Commission, in its judgment and discretion, has the authority to adjust the budget to more closely coincide with actual and expected events.

Now, therefore, be it adopted and resolved by the City Commission of the City of Sanford, Florida as follows:

Section 1. Adoption of Budget Amendment.

The annual operating budget of the City of Sanford for the fiscal year beginning October 1, 2022 and terminating on September 30, 2023 is hereby revised and amended by Attachment "A". The Attachment is hereby incorporated into this Resolution as if fully set forth herein verbatim. Except as amended herein, the annual operating budget for the City of Sanford for fiscal year beginning October 1, 2022 and terminating on September 30, 2023 shall remain in full force and effect.

Section 2. Implementing administrative actions.

The City Manager, or designee, is hereby authorized and directed to implement the provisions of this Resolution by means of such administrative actions as may be deemed necessary and appropriate.

Section 3. Savings.

The prior actions of the City of Sanford relating to the adoption of the City budget and related activities are hereby ratified and affirmed.

Section 4. Conflicts.

All resolutions or parts of resolutions in conflict with this Resolution are hereby repealed.

Section 5. Severability.

If any section, sentence, phrase, word, or portion of this Resolution is determined to be invalid, unlawful or unconstitutional, said determination shall not be held to invalidate or impair the validity, force or effect of any other section, sentence, phrase, word, or portion of this Resolution not otherwise determined to be invalid, unlawful, or unconstitutional.

Section 6. Effective Date.

This Resolution shall become effective immediately upon enactment.

Passed and adopted this 9th day of January 2023.

Attest:

City Commission of the City of Sanford

Traci Houchin, MMC, FCRM
City Clerk

Art Woodruff, Mayor

For use and reliance of the Sanford City Commission only.
Approved as to ~~form and~~ legality.

William Colbert, City Attorney
LONNIE N. GROOT
ACA

ATTACHMENT A
REQUEST FOR BUDGET AMENDMENT

Fiscal Year 22/23

Department: Development Services **Division:** Building Division 12/26/2022

CHANGES IN REVENUES

Fund	REVENUE ACCOUNT NUMBER	Revenue	Act Cd	Ele	Project #	Revenue Account Title	Current Budget	Current Balance	Amount of Change	Adjusted Unrealized
135	0000	389	98	00		Building Reserve			$ 285,000	

TOTAL CHANGES IN REVENUES $ 285,000

CHANGES IN EXPENDITURES

Fund	Dpt/Div	Activity	Obj	Ele	Project #	Expenditure Account Title	Current Budget	Current Balance	Amount of Change	Remaining Balance
135	1114	524	46	00		Repair & Maintenance Services	$ 49,024	22,990	285,000	

TOTAL CHANGES IN EXPENDITURES $ 285,000

REASON FOR AMENDMENT: to pay for the implementation of Central Square

DIRECTOR APPROVAL: DATE: 12-27-22

FINANCE APPROVAL: DATE: 12-27-2022

CITY MANAGER APPROVAL: DATE: 1/4/2023

CITY COMMISSION AGENDA DATE: 1-9-2023 APPROVED Y

FOR FINANCE USE

Entry Date: Batch Number: Document #: BA 04-100

AMENDMENT TO THE CENTRALSQUARE SOLUTIONS AGREEMENT

This Amendment (the "Amendment") amends the CentralSquare Solutions Agreement entered into by and between CentralSquare Technologies, LLC ("CentralSquare") and the City of Sanford ("Customer") with an Execution Date of April 15, 2021 (the "Agreement") expressly as provided for in this Amendment.

The Effective Date of this Amendment is the latest date shown on the signature page of this Amendment.

WHEREAS, the Parties hereto desire to amend the Agreement to add CentralSquare's Community Development Cloud Solution on the terms and subject to the conditions set forth herein; and

WHEREAS, pursuant to Section twenty-three (23) of the Existing Agreement, the amendment contemplated by the Parties must be contained in a written agreement signed by an authorized Representative of each Party against whom the amendment is to be enforced.

NOW, THEREFORE, in consideration of the foregoing and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. Defined Terms. Except as otherwise set forth herein, each defined term in the Agreement has the meaning ascribed to that term in the Agreement when the term is used in this Amendment.

2. Amendment to the Existing Agreement. As of the Effective Date, the Existing Agreement is hereby amended or modified as follows:

   a. Section One (1) is hereby amended by adding the Community Development Solution to the Agreement.

   b. Exhibit One (1) of the Agreement is hereby amended by Adding Exhibit One (1) to this Amendment.

Miscellaneous

3. This Amendment is only applicable to the addition of the Community Development Solution, no other terms of the Solutions Agreement are intended to be modified.

4. This Amendment may be executed in counterparts, each of which is deemed an original, but all of which constitute one and the same agreement. Delivery of an executed counterpart of this Amendment electronically or by facsimile shall be effective as delivery of an original executed counterpart of this Amendment.

Integration Provision. Except as expressly modified by this Amendment, the Agreement shall remain in full force and effect. As of the Execution Date, the Agreement, as further amended by this Amendment constitutes the entire understanding of the parties as regards the subject matter hereof and cannot be modified except by written agreement of the parties.

CentralSquare Technologies, LLC

DocuSigned by:

BY: Ron A Anderson
6769F1AD774045B...

PRINT NAME: Ron A Anderson

PRINT TITLE: Vice President of Sales

DATE SIGNED: 12/23/2022

City of Sanford, FL

BY: Art Woodruff (Dec 27, 2022 14:09 EST)

PRINT NAME: Art Woodruff

PRINT TITLE: Mayor

DATE SIGNED: Dec 27, 2022

CITY OF SANFORD, FLORIDA EST. 1877

Exhibit One

Community Development Project Cost Summary

WHAT SOFTWARE IS INCLUDED?

PRODUCT NAME	QUANTITY	UNIT PRICE	DISCOUNT	TOTAL
1. AnalyticsNOW Cloud Annual Access Fee	1	7,500.00		7,500.00
2. Bluebeam Server API for TRAKiT Annual Access Fee		2,100.00		2,100.00
3. Community Development: Advanced Annual Subscription Fee Saas	35	1,900.00	- 3,500.00	63,000.00
4. eTRAKiT Credit Card API Annual Access Fee		2,500.00		2,500.00
5. GIS Advanced Engine Subscription Saas Annual Subscription Fee Saas		5,500.00		5,500.00
6. TRAKiT API for Selectron IVR Annual Access Fee		3,500.00		3,500.00
7. TRAKiT Laserfiche API Annual Access Fee		1,200.00		1,200.00

Software Total	88,800.00 USD
Discount	-3,500.00 USD
Software Total	85,300.00 USD

WHAT SERVICES ARE INCLUDED?

DESCRIPTION	TOTAL
1. Community Development: Advanced Saas Subscription Cloud Setup Fee	10,000.00
2. Public Administration Consulting Services - As Incurred	61,200.00
3. Public Administration Data Conversion Services - As Incurred	30,240.00
4. Public Administration Development Services - As Incurred	17,640.00
5. Public Administration GIS Services - As Incurred	17,100.00
6. Public Administration Project Management Services - As Incurred	28,080.00
7. Public Administration Technical Services - As Incurred	8,280.00
8. Public Administration Training Services - As Incurred	24,660.00

Services Total 197,200.00 USD

QUOTE SUMMARY

Software Subtotal	88,800.00 USD
Services Subtotal	197,200.00 USD
Quote Subtotal	286,000.00 USD
Discount	- 3,500.00 USD
Quote Total	282,500.00 USD

WHAT ARE THE RECURRING FEES?

TYPE	AMOUNT
FIRST YEAR MAINTENANCE TOTAL	0.00
FIRST YEAR SUBSCRIPTION TOTAL	85,300.00

The amount totals for Maintenance and/or Subscription on this quote include only the first year of software use and maintenance. Renewal invoices will include this total plus any applicable uplift amount as outlined in the relevant purchase agreement.

Community Development Payment Terms

ONE TIME FEES

a. CentralSquare Cloud Setup Fee ($10,000) is due upon Execution of this Amendment.
b. CentralSquare Professional Services Fees are due as incurred on a time materials basis.

c. RECURRING FEES
d. The Annual Subscription Fee is due on the Execution Date for Year One, and annually thereafter on the anniversary of the Execution Date. In Years Two and Three, the Annual Subscription fee is subject to an annual increase of 4%. Beyond year Three, the Annual Subscription Fee is subject to a 5% increase. This is applicable if this Amendment is Executed by December 31, 2022. If this Amendment is not signed by December 31, 2022, the annual uplift amount for the Annual Subscription Fee will be 5%.

e. The Annual Access Fee is due on the Execution Date for Year One, and annually thereafter on the anniversary of the Execution Date. In Years Two and Three, the Annual Access fee is subject to an annual increase of 4%. Beyond year Three, the Annual Access Fee is subject to a 5% increase. This is applicable if this Amendment is Executed by December 31, 2022. If this Amendment is not signed by December 31, 2022, the annual uplift amount for the Annual Access Fee will be 5%.

ANCILLARY FEES

f. Reimbursement of travel and living expenses will be governed by Exhibit 3 ("**Travel Expense Guidelines**") attached hereto and will be invoiced monthly in arrears and due within thirty (30) days from date of invoice.
g. Customer is responsible for paying all taxes relating to this Agreement. Applicable tax amounts (if any) are not included in the fees set forth in this Agreement. If Customer is exempt from the payment of any such taxes, Customer must provide CentralSquare valid proof of exemption; otherwise, CentralSquare will invoice Customer and Customer will pay to CentralSquare all such tax amounts.
h. If Customer fails to make any payment when due, then CentralSquare may charge interest on the past due amount at the rate of 1.5% per month calculated daily and compounded monthly, or, if lower, the highest rate permitted under applicable law; and if such failure continues for 90 days following written notice thereof, CentralSquare may suspend performance or access until past due amounts have been paid.

Implementation Statement of Work

Project: Sanford, FL – Community Development (Q-97329)

CentralSquare is implementing a configurable, commercially available, off-the-shelf solution. The parties mutually agree and acknowledge this Statement of Work (SOW) is to be a planning document, not the detailed requirements or design of the solution.

Project Start Date

Parties agree the Project Kickoff Meeting will be scheduled within thirty (30) days from the Effective Date of the Agreement.

Scope of Project

The project includes the CentralSquare core system Community Development as detailed in Appendix A of this SOW.

Services Scope

The following outlines the proposed methodology for the project management, consulting, configuration, testing, training, and other services work necessary for the implementation of the contracted products, with all components delineated in the Agreement. Details related to the activities for each application included in this project can be found in Appendix A of this SOW.

Project Teams

Project teams from all parties will include functional experts, technical resources, and decision makers. Resource management is critical to success, for all parties. CentralSquare and the Customer agree to make all necessary arrangements to ensure resources are available at each stage to ensure timelines are met. CentralSquare uses a RACI (Responsible, Accountable, Consulted, and Informed) chart to outline the expectations from each member of the team, from all parties. CentralSquare's RACI Chart can be found in Appendix B of this SOW.

Project Management Methodology

The implementation is conducted by a cross-functional team of experts from several departments within CentralSquare led by the assigned Project Manager. A phased approach to project management is followed to ensure the critical services are consistent and results are achieved. Phases include:

Initiation: This phase includes the contract execution and transition to the Service Delivery team. CentralSquare may schedule an all-team meeting to kick off the project. The kickoff meeting will include time for the project managers from both teams to review all contractual documentation and begin the process of finalizing the integrated project schedule.

Planning: During the planning phase, the project managers from both teams will meet to discuss all tasks and resources necessary to successfully complete implementation. The project team from CentralSquare will be finalized, project governance will be established, and a communications plan will be drafted and shared with the parties.

Deliverables during the planning phase include the integrated baseline project schedule, communications plan, resource plan, and governance plan.

Monitor and Control: Throughout the project, the project managers will work together on monitoring and controlling the overall project health. This includes regular status meetings/reports, quality reviews, managing risks/issues, and managing resources. Project managers will work together to manage the overall timeline, scope, and respective budgets, as well as ensuring the customer's objectives are being met along the way. Any items determined to be out of scope will be immediately addressed by Central Square and customer Project Manager.

Project governance is essential to establishing a decision making and communications model for the project. Key stakeholders will be identified by all parties and regular status meetings will be scheduled to review the project health, risks to timeline/budget, and issues that may block forward progress.

Deliverables during this phase include regular status reports, risk/issue log, regular stakeholder meetings, and all project schedule updates.

Project Close Out: The final stage of the project includes an introduction and transition to the Customer Support team and the Customer Success team. During transition, the project managers will work together to conduct an audit of tasks and deliverables associated with the project. Any mutually agreed upon delayed deliverables will be scheduled for post go-live and documented. Any contracted post go-live activities will be reviewed and scheduled as necessary before transition to Customer Support.

Implementation Methodology

CentralSquare Professional Service Consultants and Project Manager follow a standard implementation approach divided into stages throughout the course of the project. Several types of services and resources (defined herein) will be used during each stage to complete the necessary steps for successful deployment of the contracted services. The Services aligned to implementation include Consulting, Technical and Installation, Data Conversion, and Training. The implementation methodology is a four-stage approach that includes:

Analysis: During this stage of the implementation, CentralSquare Consultants will meet with the Customer's functional experts to review the current workflows of key functions impacted by this project and the contract software. Decisions related to configuration will be documented in the CentralSquare Decision Workbooks for each major product and delivered to the customer for review and concurrence. Where necessary, CentralSquare Data Conversion Specialists will meet with the data experts from the Customer and review the contracted elements for conversion. Deliverables during this stage include the Decision Workbooks for each product and the data mapping for conversion.

Configuration: Using the decisions documented in the Decision Workbooks during the Analysis stage, CentralSquare will begin work with the customer to configure the system. CentralSquare will also work with the customer functional experts, as needed, to configure interfaces and complete data conversion. All admin level workshops will be completed during the configuration stage of the project: Customer should ensure key project resources are available for consultation and workshops; and customer should be prepared to host training in adequate environments. Appendix A will define workshops specific to this project and deliverables as applicable during this stage.

Testing: It is expected there will be modifications to current customer processes to align to the functionality of the newly contracted products; as such, validation through appropriate reasonable testing at various stages is critical to a successful deployment. CentralSquare uses an iterative testing approach to ensure the configurations are properly set to achieve the desired outcomes. During the testing stage of the project, the project teams will work together to ensure workflows and business processes are aligned to the application functionality. Once testing is complete, application user training will begin (see the appendix for an overview of training included in this project). Deliverables during the testing stage include Test Plans and Go-Live Readiness assessments.

Deployment: Once the project passes the Go-Live Readiness assessment, final planning for Go-Live takes place. This will include completing end user training, defining a communications plan for Go-Live, and defining a Go-Live schedule that is mutually accepted. Deliverables during the deployment stage include a go-live plan, cutover schedule, and communications plan.

Professional Services

Consulting Services: Include both interactive and independent engagements with CentralSquare subject matter experts on the various applications and functions. Types of activities included in Consulting Services are customer workflow analysis, application workshops, and configuration assistance. Also included in the consulting activities are engagements aimed at supporting the customer with testing and go-live activities. More detail on the engagement related to Consulting Services related to this project can be found in Appendix A.
A successful consultation includes multiple platforms of learning and training; therefore, the customer will provide ample workspace in order to be successful in this type of engagement. Network connections, training facilities that include computers, projectors, Wi-Fi access, recommended network configurations in place, and scheduling considerations are imperative so that all who would benefit from collaboration and training may attend.

Technical Services: Provides technology consulting at the infrastructure layer including CentralSquare applications requirements for servers, operating systems, and other various supporting products like SQL and Active Directory. Technical Services are engaged in tasks related to interfaces and integration implementation configuration and knowledge transfer. Refer to Appendix A for contracted Technical Services.

Technical Services also includes activities related to hardware installation (as necessary) and the initial software installation of CentralSquare applications. This includes the services for the provisioning of additional environments for the contracted applications: application environments included in this contract are Production (Pre-Production during implementation), Training/Testing, and Data Conversion (where applicable).

- The Pre-Production environment will become the Production environment upon Go-Live. All activities related to configuration, testing, and training will take place in the Pre-Production environment. Prior to Go-Live, CentralSquare will scrub the Pre-Production environment of all training and testing data and prep for Production Go-Live.
- The Data Conversion environment will be provisioned to align with the Pre-Production environment. This environment will be used as a working/staging environment for data conversion activities during implementation. Once the data conversion activities are complete, the environment will be decommissioned.
- The Training/Test environment will be provisioned in the weeks leading up to Go-Live in an effort to minimize the additional work needed to keep environments aligned.

Once the Training/Testing environment has been completed, and the Production environment is live, the ongoing maintenance for configuration alignment between the two environments will be the responsibility of the Customer.

Communication

Project Status Cadence Meetings: Project status cadence meetings, scheduled as determined by the CentralSquare and Customer Project Managers, establish the status of the project; achievements over a defined iterative period, risk mitigation, issue review, and assurance of awareness of upcoming activities. Continuity in the meeting schedule is critical to early intervention of risks and issues. Project Status and Issues/Risks Reporting: In addition to the regularly scheduled Project Status Meetings, the CentralSquare Project Manager provides two key types of reports as part of the Communication Plan.

The Project Status Report, distributed to key stakeholders at a frequency to be determined based on the needs of the Customer (typically bi-weekly or monthly), summarizes milestones completed, as well as recent and upcoming project activity.

The Issues Log updated continually by the CentralSquare Project Manager, tracks entry and management of project issues identified by CentralSquare or the Customer. Log entries include status updates, action items, and responsibilities of both parties. Risks and issues tracking log adjustments are mutual agreement by the CentralSquare and Customer Project Manager.

The Customer and CentralSquare agree that the individuals designated in the final project plan are essential to the services offered pursuant to this Agreement. The Customer and CentralSquare should anticipate challenging issues to arise throughout the implementation process due to the nature and complexity of projects of this type. For expedient remedying of challenging issues, the Customer and CentralSquare will use the following dispute resolution process.

All communication regarding the project directed to CentralSquare's Project Manager and the Customer's Project Manager maintain consistent communication between the parties. Regularly scheduled project status meetings maintain open communication between the CentralSquare and Customer Project Manager.

All issues or concerns are to be openly and actively discussed between CentralSquare's Project Manager and the Customer's Project Manager prior to any escalation.

If issues begin to interfere with the progression of the implementation project, the Customer and/or CentralSquare Project Manager should escalate challenges to senior management representatives.

Escalation to CentralSquare management is as follows:
Customer will provide escalation personnel to CentralSquare Project Manager during Kick-Off phase of the project.

Data Conversion Services: CentralSquare uses an iterative and collaborative approach to data conversion. This includes the initial data analysis, data mapping, and performing sample conversions for validation prior to executing the final conversion into Production. CentralSquare will provide training on the proper use of CentralSquare's data mapping tools to the customer's appropriate staff. CentralSquare consultants will work with the customer to ensure a thorough understanding of the validation requirements necessary to evaluate converted data for completeness and accuracy. Finally, CentralSquare Data Conversion Consultants will provide a final plan for converting data into the Production environment aligned to the Go-Live schedule and will review this plan with the appropriate customer staff.

For a successful data conversion, the customer will provide the necessary dataset in one of the following formats: SQL, Microsoft Excel, Microsoft Access, or delimited flat file. While CentralSquare will collaborate with the customer staff on the best practice approach to validation of converted data, it is ultimately the responsibility of the customer to ensure the validation is prioritized for timely completion and data is verified for accuracy. Up to three iterations of translation, conversion, and review are performed for each dataset; therefore, it is imperative to have sufficient time allotted for effective review at each iteration. Detailed documentation in writing will be required from the customer staff for any discrepancies or issues found during the data review. See Appendix A for the data conversion contracted for this project.

Training Services
Utilizing a global methodology for user training across all product lines ensures the preparation, documentation, and delivery of training is effective across all of CentralSquare branded core applications, add-ons, and interfaces. Training sessions can occur through multiple vehicles such as live-online, e-learning on demand, and face-to-face classroom settings. CentralSquare Consultants work with customer administration and subject matter experts to establish a training plan to include the course objectives, schedule, location(s), and participants.

CentralSquare provides a hands-on, interactive approaches to user training: End-User and Train-the-Trainer.

- End-Users are defined as employees who will access the application(s) on a regular basis to perform their daily activities. End-User classes incorporate various functions based on realistic scenarios focused on process using the applications inherent tools to ensure productive use of the system at and after Go-Live. Topics in End-User courses will include data entry, searching, reporting, and application navigation.
- Train-the-Trainer courses are designed to prepare the Customer's trainers to conduct End User training. CentralSquare uses a teach and teach-back approach for Train-the-Trainer to allow for our Consultants to evaluate the Trainer's knowledge and ability to convey methodology appropriate to the use of the CentralSquare applications.

Successful trainings rely on the customer to dedicate assigned personnel to attend sessions limiting the interruptions of normal work duties. To ensure training is most successful the Customer will provide appropriate classrooms, facilities, connectivity (networks and lines to data terminals), devices with system software installed, and related equipment/materials to support each training class. With a hands-on and interactive approach to training, every effort should be made to include one full-function workstation per student, one full-function workstation for the instructor, necessary projection equipment, a whiteboard, and network connectivity. Every attendee should have the prerequisite skill sets, operations knowledgebase, and dedicated time to complete follow-up tasks after the completion of the training. See Appendix A for an overview of End-User training associated with this project.

APPENDIX A: Application Deployment Strategies

PRODUCT: COMMUNITY DEVELOPMENT

Analysis:

To begin, we jointly perform a comprehensive analysis of your current state processes related to core system functionality. In this stage we also begin the process of data conversion by analyzing your legacy data. Significant tasks include:

Major Task	*Description*
Business Process Review	Consultant meets with different areas of Community Development reviewing and analyzing all key business processes. All sessions will be discussions on processes relating to that area within Community Development. Deliverable: Community Development Formal BPR Report and Recommendations.
Workbook Introduction	The consultant will introduce and walk through the workbooks which will be used to capture the existing state of the client's applicable Community Development modules.
Data Migration Mapping	The consultant will work closely with the agency's legacy data expert, to review the source data and map it to the proper target data field in Community Development

Monitor & Control:

During this phase, the consultant has become familiar with your configuration requirements, processes, and current workflows. With this knowledge, we will deliver your configured system and converted legacy data into your new pre-production environment. Next, our consultant will provide guidance as you begin iterative testing that will continue throughout the remainder of the implementation. Also, our data conversion team guides you through testing your converted data and Admin training begins. Significant tasks include:

Major Task	*Description*
The Work-Booking Process	The Consultant will work with the client remotely across multiple sessions to refine the workbooks to a final state of acceptance.
System Configuration	CentralSquare Technologies configures system according to signed Decision Workbooks. Client provides additional information as needed.
Python Scripting and Geo Database Delivery	The GIS Specialist builds Python scripting by GEOTYPE (example: Parcel, Address, Street) based on the Land Management Workbook to gather required data to populate the appropriate Community Development database tables for initial delivery and installation at the client's site.Upon completion of the scripting, the GIS Specialist delivers the GEO database to the Database Specialist for inclusion in the initial delivery of the client's testing database.
Configuration Validation	CentralSquare Consultant completes the Configuration Validation checklist of the system to verify system is configured to meet the requirements.
Admin Skills Workshops	Training classes, designed as hands-on workshops, include building code tables, picklists, system settings, and assignment of security permissions. Designed for supervisors, system administrator, and staff with decision-making authority. Please see below for more details.

Modules included	*Definition of Module*
Property Data & Ownership Management	Land Management is at the heart of our system, providing comprehensive land data obtained from the assessor's office to ensure accuracy. Users can conduct a preliminary screening of a property and then link a project, permit, or code complaint case directly through Land Management. Combined with industry-leading GIS technology, users receive the power of database technology with digital maps and aerial photos to provide a graphical view of the land record. This allows the agency to be proficient in performing spatial analysis (i.e., recognizing areas with several code

violations, expiring permits, different zoning criteria) by obtaining the reporting information graphically on the map.

CAPABILITIES INCLUDE:

- View any related County Assessor data
- View related records associated with a parcel
- View GIS details with a single click
- See all subdivisions, land splits, annexations, and site mergers
- View owner details
- Create a permit, project, case or license on a land record
- Control parcels, buildings, addresses, and street segments
- Add a warning or lock down a land record
- Manage property inspections
- Define address naming conventions
- Research property and building details
- Print owner merge letters and notifications
- Execute dynamic queries
- Keep historical records

Geographical Information System Mapping

State-of-the-art ESRI GIS Integration allows all development activities such as permits, projects, land management, code enforcement, licensing, and inspections to be managed directly from the parcel fabric. Central Square Community Development leverages your agency's ESRI GIS to enable users to visually search the map for development activity and display results in reports. GIS Integration offers enhanced user controls, allowing users to view related records associated with the parcel, create permits, and code cases directly from the map, and even run a query to illustrate search results.

This allows the agency to become more efficient in recognizing areas with several code violations, expiring permits, or different zoning criteria. Rather than running different reports, this information can be graphically represented on the map.

CAPABILITIES INCLUDE:

- Contractors can pay fees for associated permits
- See all subdivisions, land splits, annexations, and site mergers
- Control parcels, buildings, addresses, and street segments
- Manage property inspections
- Define address naming conventions
- Research property and building details
- Create and save spatial bookmarks
- Use multiple internal and public map services
- Use measurement and drawing tools
- Run radius notifications and print owner letters
- Use Network Analyst for routing and directions
- Execute dynamic queries and perform spatial analysis
- Select multiple parcels to combine into a project, permit, or case
- Search or create a permit, project, case, or complaint from the map
- Use common Microsoft Bing maps and Google Street View features

Planning & Zoning	Planning & Zoning manages the workflow for all types of projects, from application to review and approval. The system records all assigned actions and any conditions of approval for future evaluation. Attachment capability allows users to scan plans with mark-ups and link them as part of a project's history. A time clock function automatically schedules critical points along a project's timeline. This ensures all reviewers stay on target. User-definable screens allow administrators to easily create additional screen templates to track and record unique information. **CAPABILITIES INCLUDE:** • Track phone calls, emails, or letters • Track reviews in timesheet • Project review cycles and notes • Attach different iterations of plans with mark-ups • Inspection tracking • Contact management • Conditions for approval maintained on project • Detailed reports for fee information, project tree, and more • Event scheduler for meeting dates, e. g., Planning Commission • Automatic assignment of reviews • Unique fee schedule for each application type • Track engineering and public works projects • Direct interface to GIS for project management • Issue multiple permits from a single project • Create annexations and subdivisions
Permitting & Inspections	Streamline your agency's permitting process by tracking the unique workflows for all types of permits. The Permitting module captures everything your users need, from contact management, related permits, plan review tracking, inspector scheduling, and financial details. Permits tracked in this module are customized according to your agency's workflow requirements, including permit type, status queues, valuation details, review types, action types, customizable screens, inspection requirements, and fee schedules. Your agency can incorporate unique procedures to ensure timelines are met efficiently, reports are executed properly, and managers are alerted when necessary. **CAPABILITIES INCLUDE:** • Unique workflow for each permit type • Schedule inspectors by region, permit type, or inspection type • Review related cases, projects, sites, or permits • Compare multiple permits side by side • Manage permit reviews and conditions • Unlimited user-defined search options • Warning flags for outdated contractor licenses • Copy/duplicate information from another permit • Require previous inspections • Create unique job valuations • User-defined standard comments • Incorporate unique fee schedules

- Issue permit forms and Certificates of Occupancy
- Use inspection checklists
- Generate public Twitter notifications of permit activity

Code Compliance

Code Compliance provides incident and activity management while tracking the workflow for all types of code enforcement activities, from the time a complaint is received through resolution of the incident. When a complaint or violation is entered on a property, Code users have the option to lock down the parcel record and place a flag on all records associated with the property.

Users can maintain contact information and attach images and documents to each issue. Administrators can create user-defined screens to track and record information unique to your agency. This data can be merged into reports, forms, and other documents.

CAPABILITIES INCLUDE:

- Create cases from GIS map
- Lock down parcel when certain case types are created
- Track all activity dates
- Follow multiple violations on a code case
- Incorporate all code text into TRAKiT for easy reference
- Attach photos and letters to records
- Email notifications
- Link to different records
- Create Case Details report
- Repeat important dates
- Protect all information from non-officer staff
- Track all phone calls, emails, or letters
- Capture unique information on user-defined screens
- Identify addresses using Google street view
- Generate notice of violations and warning letters

Business & Regulatory Licensing

Licensing issues and tracks a variety of license types, including animal, business, and facilities. Your agency can tailor several fields to your needs, including license types, classification codes, ownership types, and more. At a glance, users can quickly review all information pertinent to a specific record.

The system maintains insurance details to track workers' compensation, liability insurance, and state business licensing information. Automatic batch processes can send out renewal notices before due dates, and the system processes renewal fees. Reports can display the number of unresolved licenses and show any fees collected.

CAPABILITIES INCLUDE:

- Maintain all contact information associated with a license
- Allow for online management for citizens
- Custom-tailored fields and screens
- Manage all activities and reviews
- Batch process for renewal notices
- Proration and penalty fees automatically calculated
- Assign conditions for a business
- Associate fees unique to each license type
- Move licensee information into AEC TRAK directory

- Link license to a specific parcel
- View records related to a license, e.g., permit
- Attach documents and photos
- Track all insurance and registration information
- Check off educational courses completed
- Unique licensing requirements and workflows

Directory for Architects, Engineers & Contractors

AEC Entity provides instant access to all information associated with people who frequently have business with the agency, as it relates to permits and projects. Any type of professional can be tracked, including architects, engineers, contractors, and surveyors to name a few. Common information associated with these contacts can be viewed quickly from a single screen.

You can access license and insurance information, associated contacts, and related records from AEC Entity. Simply look up the professional or business to associate them as a contact in another module. As a result of AEC's directory integration, users will be prompted prior to adding contacts if there is a warning flag or any outdated insurance information.

CAPABILITIES INCLUDE:

- Contractors can pay fees for associated permits
- All insurance carrier information can be inserted
- Warning flags prompt users about expired information
- Preview all associated records with the contact
- Chronologically track any communication with contractors
- Maintain license information
- Link to business license information
- Track multiple insurance carriers
- Attach photos and proof of insurance to records
- Internet link provided for state licensing information
- Send emails or text message to individuals
- Add new permits and projects from the AEC record
- Restrict information from certain users

Customer Relations Management

The CRM module provides the tools you need to quickly capture and manage citizen issues. Users can effectively monitor, and track issues received through the phone or internet. The system logs opened and closed issues as well as their exact location. Users can also link recurring issues and complainants to ensure issues are handled in an appropriate manner.

Workflow activity tracking is designed with built-in processing and features to help users resolve various issues presented by their citizens. Administrators can customize workflows according to pre-existing or new processes. Users can identify the exact location of an incident by using the GIS map.

CAPABILITIES INCLUDE:

- Route issues for response
- Filter search results
- Link issues to existing cases or permits
- Capture complainant details
- Use GIS map for pin-pointing exact location
- Audit log to ensure staff accountability
- Transfer workflows into other applications within the agency
- Built-in workflow functionality

- Auto-send emails or letters
- Create a code enforcement case from a reported incident
- Run reports to determine response times
- Track all details associated with the work order
- View entire history of the location
- Route workflows to different departments

Online Portal for Contractors & Residents

eTRAKiT is a public facing portal that provides access to permit, project, license, code, land, and inspection information. Citizens can request inspections, pay fees, upload plans apply for permits and much more through eTRAKiT.

eTRAKiT offers different profile permissions including anonymous searching as well as restricted access to additional details based on the user's role. Contractors have additional functions that enable them to request inspections for their projects. Additionally, if your jurisdiction uses outside plan review agencies or inspectors, eTRAKiT enables them to use back office functions through the portal such as entering results or uploading files.

FEATURES

- Apply for permits, projects, and licenses online
- Schedule inspections and review online
- Update license information and pay renewal fees
- Upload application details and submit plans online
- Access to records based on user permissions and profile
- Map-based parcel and address search based on jurisdictions GIS.
- Configure your online portal to match your municipal website
- Outside agencies including plan reviewers and external inspectors can enter data online in an Agency Center
- Contractors have access to record details specific to their role with a historical view of their accounts
- Online payment plugins for variety of payment providers including

1. Authorize.Net
2. CardConnect
3. CardKnox
4. CSJ (JetPay)
5. Elavon (Converge)
6. PayFlowLink (PayPal)
7. Paymentus
8. USA ePay
9. CentralSquare Payments

Mobiles

Inspectors and officers can carry information about permits, code enforcement cases, and related inspections on their iPad, Android, or smartphone. Inspectors can modify the inspection status, enter inspection results and notes, schedule inspections, and more, all while in the field.

The Mobiles app allows remote users the flexibility to use CentralSquare from an iPad or Android device even without a constant wireless connection.

Mobile PDA allows access to the same details provided in the office, from smaller devices such as smartphones and tablets.

FEATURES

- Result scheduled inspections
- Use standard comments
- Modify, schedule, and route inspections

- View attachments
- View and update contact information
- View fee details
- To-do list of inspections for defined date range
- Add a warning or hold to a property
- View custom screens unique to each record type and add information
- Mapping location uses
- Microsoft Bing
- Find permits, projects, cases, or licenses through ad hoc search functionality
- Contractor access to request inspections
- Inspection checklists
- Play recorded messages
- Send notifications via email

Admin Skills Workshops

Workshop training classes, designed as hands-on workshops, include building code tables, picklists, system settings, and assignment of security permissions. Designed for supervisors, system administrator, and staff with decision-making authority, these workshops kick off the application configuration process for designated project committee members. These classes generally are limited to six participants (or as determined by mutual agreement of the CentralSquare and Customer Project Managers) and should be attended by those responsible for maintaining user information and code tables, as well as by subject-matter experts in the specific application area. Class time focuses on beginning the building process under the guidance of the assigned CentralSquare trainer, as well as to discuss CentralSquare recommendations regarding potential configuration options as identified during the Functional Analysis Workshop.

Class Title	# of Classes	Training Type	Intended Audience	Topics	Location
Subject Matter Expert Training	1	Hands-on, Instructor-led Training	System Admins, Client SMEs & Core Team Members	General Navigation, Overview of each module is included, review of client's testing strategy	Remote
Admin Training	1	Hands-on, Instructor-led Training	System Admins	Covers all modules, designed to train local administrators of the system and covers all areas of configuration with the system	Remote
Cognos Report Writing Training	1	Hands-on, Instructor-led Training	Staff with some forms & report building experience preferred, but not required	Covers basic report development and using the Cognos report building system, as well as how to manage and run completed reports	Remote

CUSTOM REPORT DEVELOPMENT:

The Report Development team will work directly with the Client to identify reports to be created. The reports will be chosen by the client in conjunction with the number of hours available for this task. CentralSquare will scope the requested reports and assign hours to each. The Client will then choose and prioritize the reports that are to fit into the available hours. Hours assigned to each report will include specifications, development of the report, and modifications (within scope). Delivery of the reports will be made as they are completed and approved.

DATA CONVERSION:

The data conversion process will start with mapping the client's legacy data from CitizenServe into the Community Development production database format. The process includes three major data refreshes, including the final cut-over for Go Live and any number of minor changes to correct small issues, such as spelling or placement of data within Community Development. The conversion program will be designed to run while the target database is in full operation; however, because of the volume of data being processed, it will be ideal to execute the conversion during a window of minimal usage. Data conversion contracted for this project includes 5 years of the following data:

Modules To be Converted	*Definition of Module*
Permitting	Legacy permit data currently in the local government agency's current system of record. Generally, this is data representing the agency's construction or remodeling projects for properties within the agency's jurisdiction. It is intended to ensure that the project plans comply with local, state, and national building and construction regulations
Planning & Zoning	Legacy planning & zoning data currently in the local government agency's currently system of record. Generally, this is data representing the agency's development and design of land use and the built environment, including air, water and the infrastructure passing into and out of the agency's jurisdiction. It is intended to ensure that the land use and zoning changes comply with local standards for land use, zoning, and urban planning
Code Compliance	Legacy case data currently in the local government agency's current system of record. Generally, this is data representing the agency's regulatory compliance violations for properties within the agency's jurisdiction. It is intended to ensure that the properties conform to the rules and standards set forth in the agency's municipal code of ordinances
Business & Regulatory Licensing	Legacy business licenses data currently in the local government agency's current system of record. Generally, this is data representing the agency's Regulatory Licenses, which are permits issued by the agency that allow individuals or companies to conduct business within the agency's jurisdiction. It is intended to ensure that the businesses conform to the rules and standards set forth in the agency's municipal code of ordinances and/or the state's regulatory rules
Land Parcel Management	The land parcel data commonly includes details of the ownership, precise location, dimensions, and value of individual parcels of land, within the agency's jurisdiction. It is intended to provide comprehensive land details obtained from the agency's source GIS system or Assessor's office, to ensure accuracy
Customer Relations Management	Legacy data that contains historical communications primarily from property owners within the agency's jurisdiction and generally consists of questions, issues, or complaints
Entity Management	The entity data commonly includes details of individuals and businesses that interact with the agency, on a regular recurring basis. It is intended to provide the agency with a quick reference source of contractor, engineer and tradesmen that can be linked to activities within the Community Development system

INTEGRATION/INTERFACES:

Integrations and/or interfaces included in this project include:

[Remove interfaces not included]

Integration/Interface	**Use of System**	**Type / Frequency**	**Import/ Export**	**Interface Method / Future Functionality**
Integrated Voice Response (IVR)	Processing inspection scheduling and related transactions using 3P IVR solutions	On Demand	Import/ Export	File Based DLL / 3rd party IVR hardware, software & services must be contracted separately

Integration/Interface	Use of System	Type / Frequency	Import/ Export	Interface Method / Future Functionality
Laserfiche (DMS) – On premise	Processing documents between Community Development and 3P document management solutions	On Demand	Export	File Based DLL
Financial Batch Export	Queries system for payments and creates a file to be processed in a 3rd party GL	Batch / Nightly	Export	SQL Stored Procedure & SSRS Report
Land Parcel Management Update Routine	Ensures the land parcel data within the system, stays up to date	Batch / Nightly	Import	File Based DLL
Bluebeam	Opens and saves PDFs within the system for plans review and markup	On Demand		File Based DLL
ESRI GIS - Standard	Uses a published rest endpoint from ESRI to display map data with the system	On Demand	Import	Web Services
Online Payment Gateway ***<see Note * a. below>***	Interface for credit card payment processing	On Demand	Import/ Export	File Based DLL
Over the Counter Payment Gateway ***<see Note * b. below>***	Interface for credit card payment processing	On Demand	Import/ Export	File Based DLL

Notes:

* Client will need to contract with a new payment provider, to accept payments over the counter (OTC) and/or online and provide credentials to CentralSquare within 30 days of project initiation.

a. Supported online Payment Providers
   i. Authorized.Net
   ii. USA ePay
   iii. Elevon (Converge)
   iv. PayFlowPro (PayPal)
   v. Paymentus
   vi. Cardknox
   vii. CardConnect
   viii. CSI (JetPay)
   ix. CentralSquare Payments
b. Supported over the counter Payment Providers
   i. Paymentus
   ii. Cardknox

Testing:

Testing will assess your team's readiness for Go Live. This includes knowledge transfer, end user training, and change management significant tasks include:

Major Task	*Description*
Testing	The testing phase is an iterative process, conducted by the client, to help the consultants check the quality of the legacy data conversion and review the configuration decisions made during the discovery phase of the project. This phase is especially important to ensure a smooth transition before the system launches.
Go Live Support	This session will be used to provide support for Go Live. The topic will be determined by client needs. *See Go Live below.*

TRAINING:

Within Testing and Deployment, End-user training is completed.

End-User Training

End-user training provides hands-on, process-based instruction focusing on key tasks related to users' job responsibilities. With the decision to choose CentralSquare facilitated training, an instructor provides training on the chosen contracted solutions. End-user classes incorporate extensive activities based on realistic scenarios focusing on processes and tools within the applications for productive use of the system at and after Go-Live. These classes generally are limited to 10-12 participants (or as determined by mutual agreement of the CentralSquare and Customer Project Managers). Agendas for each module will be based on specific configuration and workflows established during the implementation. Topics in end-user classes will include data entry, searching, reporting, and application navigation.

Core Solution	# of Classes	Training Type	Intended Audience	Topics	Location
End User Training	1	Hands-on, Instructor-led Training	All Users of the ComDev System	General Navigation, End to end training of each module based on the specific configuration and workflows established during the implementation	Remote

Other Training Events

Training Type	# of Classes	Training Type	Intended Audience	Topics	Location
Data Querying	1	Hands-on, Instructor-led Training	Data SMEs	How to create ad-hoc reports using tools within the application.	Remote

Deployment:

Starts with the completion of your production environment. Then, we conduct a mock Go Live. Finally, once both teams agree on readiness, we Go Live. Significant tasks include:

Major Task	*Description*
Configure Production Environment	CentralSquare Consultant completes the Configuration Validation checklist of the system to verify system is configured to meet the requirements.
Plan Cutover Schedule and Comunications	Describes tasks to be handled by CentralSquare and Customer personnel during the initial cutover to Go-Live, including a detailed schedule of CentralSquare personnel covering each shift with resources, process for reporting issues, how they will be handled or escalated, contact names/phone numbers onsite staff, remote and third-party vendors.
Execute Go Live	The Client transitions from their legacy system to the Community Development system and conducts their normal day-to-day business.
Go Live Support	This session will be used to provide support for Go Live. The topic will be determined by client needs. *See Go Live below.*

GO LIVE (additional information):

CentralSquare offers a variety of Go-Live services to augment the Customer's staff during the transition from the legacy product to the CentralSquare solution. Included in this project, the Project Managers will work together to create a Go-Live Plan to include a schedule of events, resource allocation, communications plan, and issue log. Additionally, CentralSquare will support the Go-Live with the following services:

Type of Resource; Role	Number of Days	Onsite or Remote

Consultant: Supporting staff during go live event	2	Remote
CentralSquare Project Manager; Supporting project during go live event	As Needed	Remote

Definitions:

Key Deliverables	Description	Frequency	Owners
Project Management Plan	Guides the project management team to monitor and control expectations, budget, scope, schedule, communication, and quality.	Finalized during the Planning phase during discussions about Project team and timeline	CentralSquare Project Management Team
Project Schedule	Identifies tasks to be completed during the life cycle of the project including the key SOW tasks, resources, durations, milestones, and delivery dates	An updated schedule will be provided as needed	CentralSquare Project Mgr. and Customer Project Manager
Communication Plan	Describes the key project team members from CentralSquare and Customer Executives to Subject Matter Experts, includes, roles and responsibilities, and contract information	Provided at Kick-off and updated as required	CentralSquare Project Manager
Decision Workbook	Workbook that contains customer decisions regarding processes and system configurations.	Provided at Kick-off and updated as required	CentralSquare Consultant
Monthly Status Report	Following regular status meetings, the CentralSquare PM will provide an updated status report	Determined by Customer need during kickoff	CentralSquare Project Manager and Customer Project Manager
Issues Log	Tracks risks and issues, Assignments, progress, mitigation strategies, due dates, and other relevant information for managing risks and issues	Determined by Customer need during kickoff	CentralSquare Project Manager and Customer Project Manager

Risk Register	Classifies the risk based on probability and impact to the overall project and develops mitigation and response plans, where appropriate.	Maintained throughout the course of the Project	CentralSquare Project Manager and Customer Project Manager
Implementation Guide	End-to-end summary of engagements that make up the CST implementation.	Provided at Kick-off and referred to throughout the project	CentralSquare Project Manager
Test Workbook	Workbook that contains all test and assessment cases completed during the implementation.	Provided at Kick-off and updated as required	CentralSquare Project Manager
Go Live Plan	Describes tasks to be handled by CentralSquare and Customer personnel during the initial cutover to Go-Live, including a detailed schedule of CentralSquare personnel covering each shift with resources, process for reporting issues, how they will be handled or escalated, contact names/phone numbers onsite staff, remote and third-party vendors.	A draft will be provided prior to Go-Live, reviewed with the Customer, and finalized for distribution to stakeholders	CentralSquare Project Manager and Customer Project Manager
Services to Support/CSM Project Closeout Report	The delivery of formal closing documents as part of acceptance includes completed project artifacts outlined above, change order summary, lessons learned and recommendations, risk and issues log, customer support transition plan, and description of steady state operations.	Provided at the end of the project	CentralSquare Project Manager

APPENDIX B: RACI Chart

- Responsible (Who is/will be doing this task?)
- Accountable (Who is the decision maker?)
- Consulted (Anyone/stakeholders that can talk about it.)
- Informed (Whose work depends on this task/needs to be kept up to date?)

	Sales	Project Management			RMO		Service Delivery						GIS		Cloud Services		Cust Success	Support	Customer			
	Account Executive	PMO Senior Leadership	PM Manager	Project Manager	RMO Leadership	Resource Planner	SD Senior Leadership	SD Manager	Trainer	Consultant	Installation Specialist	Data Conversion Specialist	GIS Manager	GIS Specialist	Cloud Team Leadership	Cloud Team	Cust Success Manager	Support Analyst	Customer Sponsor	Customer PM	Cust Functional Leads	Customer SME's
Phase 1: Initiation																						
Assigning a Project Manager			R, A	I				I														
Sending Introductory Email to Customer				R, A				I												I		
Performing Contract / Project Setup and Intelligence Review			C	R, A				I														
Sizing a Project for Velocity			C	R, A				C														
Requesting an Implemenation Guide			C	R, A																		
Building Project Folder				R, A																		
Building Initial Draft of Project Artifacts			C	R, A																		
Initially Contacting Third Party Vendors				R, A																		
Requesting Work From the Cloud Team				R, A				I							I	I						
Sending Welcome Package to Customer				R, A						I									I	I	I	I
Conducting Sales to Service Transition Call	C		C	R, A				C	I	I	I	I	C	I		I						
Initially Calling Customer				R, A						I									I	C	I	I
Drafting Initial Project Timeline				R, A		I		C		I									I	C	C	C
Completing Project Initiation Checklist				R, A															I	C	C	C
Phase 2: Planning																						
Performing Project Kickoff	I	I	C	R, A			I	C	C	C	C	C	C	C	I	I			C	C	C	C
Scheduling Resources			I	C	C	R		AC	I	I	I	I	C	I		I						
Reviewing Project Plan with Customer				R, A						I									I	C	C	C
Receiving Project Plan Customer Signoff		I	I	R, A	I	I	I	I	I	I	I	I	I	I	I	I			C	C	C	C
Completing Project Planning Checklist				R, A															I	C	C	C
Phase 3: Monitor & Control																						
Conducting Cadenced Status Meetings				R, A					C	C	C	C		C		C				C	C	C
Completing Monthly Status Reporting		I	I	R, A			I	I	C	C	C	C	I	C	I				I	I		
Performing Issue Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			I	C	C	C
Performing Risk Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			C	C	C	C
Performing Change Control Management				R, A															C	C	C	C
Performing Change Management				C															R, A	R	R	R
Performing Project Health Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			I	C	C	C
Performing Executive Stakeholder Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			C	C	I	I
Preparing for Go-Live		I	C	R, A			I	C	C	R	R	C	C	C	C	C	I	I	I	C	C	C
Conducting Go-Live	I	I	C	R, A			I	C	C,R	R	R	R	C	R		R			I	C	C	C
Stage 1: Analysis																						
Workflow Analysis			I	I			I	C	C	R	A	C	C	C					I	C	C	C
Analyze Technical and Functional Requirements			I	I			I	C	C	R	A	C	C	C					I	C	C	C
Data Migration Mapping			I	I			I	C	I	A	C	R	C	C					I	C	I	C
Stage 2: Configuration																						
Build Environment				I			I	I	I	A	R		C	C					I	I	C	C
Configure Environment									C	R	C		C	C					I	I	C	C
Unit Testing				A						R	C		C	C					I	I	C	C
Adminstrative Workshops									R	C			I	I					I	I	C	C
Data Conversion				I				I		A	C	R	I	C					I	I	I	I
Stage 3: Testing																						
Testing				I				I		R	C									I	C	C
Fix Issues and Retest				I				C		R	A	C									C	C
System Sign-Off				A				I		R	C		I	C					I	C	C	C
Knowledge Transfer/User Training				I				I	R													
Go-Live Readiness				A				I		R									I	I	I	I
Stage 4: Deployment																						
Configure Production Environment			I	I			I	I		C	R										C	C
Plan Cutover Schedule and Communications				R				C		C	C								I	C	C	C
Pre-Launch Testing								I		R	C											
Go-Live + Communication		I	C	R				C		C	C								I	I	I	I
Phase 4: Closeout																						
Completing Transition to Support and CSM		I	I	R, A			I	I	I	I	I	I	I	I			R	R		C	C	C
Delivering Post Go-Live Items				R, A					R	R	R	R		R								
Performing Post Go-Live Issue Resolution				R, A					R	R	R	R		R		R		R				
Conducting Closeout Meeting with Customer				R, A															I	C	C	C
Performing Contract Reconciliation				R, A					I													
Completing Lessons Learned		I	C	R, A	I	C	I	C	C	C	C	C	C	C	I	C	I	I				
Archiving Project Folder				R, A																		
Performing Management Review			C	R, A																		
Closing Project in OpenAir				R, A																		
Completing Project Closeout Checklist				R, A																		

APPENDIX C: General GIS Requirements

Introduction

Community Development includes a property record application where users can look up current parcel activity and information related to the parcel. The GIS Module is at the heart of the system and provides comprehensive land data obtained from either the assessor's office or the client's GIS data to ensure accuracy. Users can conduct a preliminary screening of a property and then link a project, permit, code enforcement case, or license record directly through GIS Module.

The GIS integration requires map services to be provided and maintained by the client, and our Land Management Update Routine (LTUR) performs a one-way update process pushing updates to the Community Development data daily/weekly/monthly outside of business hours.

GIS Data Requirements

All GIS feature classes, also referred to as layers, must have correct geometry in an Esri-recognized local projection. The client is responsible for providing and maintaining GIS data in a consistent format, including the feature class name, location, field schema, projection, etc. Unique types of features, such as parcels, must be provided and maintained in single feature classes. For example, if the client's jurisdiction is crosses two counties who provide street data, the client will need to combine both street data feature classes into a singular layer.

The Land Management Workbook, to be completed by the client, maps the field in the client's GIS data to the appropriate fields in the Community Development database enabling them to appear in the system. Data attribute requirements are limited; however, missing attributes will result in empty values for the associated attributes in the system. A limited number of user-defined fields are available in the system to enable the client to include attributes that our outside of the standard fields.

GeoTypes

GeoTypes are the core GIS features integrated into Community Development and include any of the following features:

- Parcels: required
- Address Points: recommended
- Streets: recommended
- Others can be discussed with the GIS Specialist during the initial consultation

A dedicated ID field (string data type) is required for each GeoType feature class except for parcels, which should use the Assessor's ID for that purpose. Each ID value must be unique across GeoTypes, and the ID and other critical fields are required to be present in the primary published map service. Condominiums may be represented with stacked parcels.

Boundary / Polygon Layers

Typical boundary layers include zoning, city limits, historical districts, flood zones, etc. A limited number of spatial joins can be configured by CentralSquare to add attributes from boundary data to the GeoTypes to enable full functionality. The most common example is joining the zoning layer to the parcel data.

For clients with the GIS Advanced license, geography-based Spatial Rules triggering fees, reviews, inspections, and more during the creation of permits, projects, code cases and licenses are based on the relationship between GeoType Layers and others. The client is required to supply any polygon layers that are to be used to designate areas impacted by Spatial Rules.

ArcGIS Enterprise (Server) Requirements

Community Development requires map services to be published with Esri's ArcGIS Enterprise or ArcGIS Server. The ArcGIS instance does not need to be solely dedicated to this purpose but must meet the requirements below.

- ArcGIS Enterprise versions 10.3.1 to 10.8 *(check with CentralSquare on later version compliance)*
- Authentication/Security
  - The client must provide CentralSquare with login credentials for an ArcGIS Portal User
  - Web-tier authentication using Windows Authentication is not supported for cloud clients; however, on premise clients with version 18.2 HF09 or later may utilize this.
  - SAML based Active Directory based Federation is not supported. However, Portal for ArcGIS can use built-in account.
- If Community Development is to be hosted by CentralSquare, the client's map services must be available externally through the web. This typically requires the ArcGIS Web Adapter to reside in the client's DMZ.
  - CentralSquare will require built-in user's admin credentials for map rendering and source of data for Land Management Update Routine.
  - SAML and Web-tier based authentication will not be supported. Development work in progress.

ArcGIS Online

ArcGIS Online may be used to provide map services as an alternative to ArcGIS Server for the Standard GIS License only. **NOTE: ArcGIS Online is not supported for the GIS Advanced license/Spatial Advisor and the eTRAKiT map.**

ArcGIS Map Service Requirements

The Community Development GIS integration relies on ArcGIS map services that are created and maintained by the client.

Map Service Rules and Requirements

- Community Development requires an Admin Portal user and password to consume REST URLs from a portal. An ArcGIS Online user may be provided as alternative if the service is not to be used for the GIS Advanced licenses/Spatial Advisor or eTRAKiT.
- Map services must be available externally through the web for Cloud clients.
- All map services must start with Layer (0) and run consecutively without gaps between layer numbers
- Additional service-specific requirements are outlined below

Required Map Services

The client is required to provide a minimum of three dedicated ArcGIS map services. Those and additional optional services are outlined below.

1. Feature Map Service

   This map services provides the GIS data necessary to populate and maintain the data in the Community Development's Geo Tables in the cloud SQL database. This service must include all layers to be integrated with Community Development. Feature access must be enabled with Query/Data operations allowed, and all layers must be in same projection.

2. GeoType Map Service

   The GeoType Map Service is used to provide access to ESRI feature class data in the management of the Community Development Software. Feature access must be enabled, and all layers must be in same projection.

3. Display Map Service

The Display Map Service provides an interactive view map in the application. The client should build this map service with the symbology, scaling, and layer order that will provide end users the best and most complete experience. This service requires a geometry service and a printing service

4. Optional Display Map Services

Other map services can be added to Community Development's Map Viewer to provide more mapping functionality to your users, in a view-only mode. This service requires a geometry service and a printing service.

Additional Details:

- Aerial Photos:
  - Must be a tiled, cached map service.
  - Image Services are not supported.
- Community Development's Map Viewer supports Street View and Bird's View with a valid Google map key. Clients will need to provide this key and add the Community Development URL as a valid referrer.
- Map services can be specific to departments within your organization, such as public works, utilities, recreation facilities, etc.
- Community Development's Map Viewer can support:
  - Routing services via Network Analysis Server
  - Geocoding services

APPENDIX D: Cloud Services (Cloud Services - AWS)

CentralSquare and Customer will conduct the following as part of this project.

SAAS

Tasks	Name	Description	Customer Role	CentralSquare Role
1.	Creation	Initial Creation of CentralSquare's Community Development software	• Attend Discovery Call	• Discovery Call • Complete install and data migration
2.	Test Account Creation	Test Account Creation is the creation of the test account which is cloned from the pre-production environment.	• Validate Account	• Create Test Account

Assumptions

- CentralSquare will migrate all Customer data into the Community Development database and confirm that the Community Development software's primary system functions are available.
- CentralSquare will install the Community Development software into our Public Government Cloud environment, managed by our Cloud services team centers and provide access to the Customer through a standard URL. We will also provide a VPN device to access the URL to secure Customer required third-party integrations identified for this project.

- CentralSquare will complete all work remotely
- CentralSquare will create one (1) Production Account and one (1) Test Account as part of the Agreement. Additional accounts will require additional hours added under separate quote by mutual written agreement at CentralSquare's prevailing rates.

Roles and Responsibilities

CentralSquare:

- Load files and perform initial configuration of all licensed CentralSquare applications, including base and add-on modules, and interfaces to third-party applications. Configuration includes activating appropriate modules, table set up, and selection of mandatory configuration settings based on combination of CentralSquare applications purchased.
- Set up test environment as mirror copy of the production environment.
- Conduct a test to verify that CentralSquare applications have been installed and configured successfully, operating properly, and are ready to begin the implementation and configuration process. Note: Not all CentralSquare components may be ready at this point, for a full test, but a reasonable effort ensures CentralSquare components are ready for the next step in the process. CentralSquare installation services will ensure that all needed components are prepared and ready prior to conducting subsequent activities for the specific application area according to the agreed upon Project Schedule.

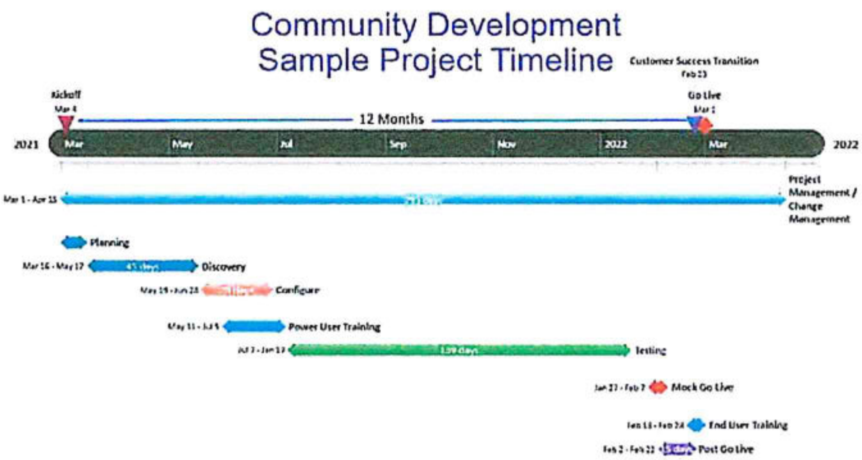
Customer:

- Participate in planning activities (conference calls, emails) with CentralSquare Application Installation Consultant and Technical Lead.
- Provide access to Customer's servers (including third-party) as required for CentralSquare Technical Lead and Application Installation Consultant to perform installation and migration tasks.
- Attend knowledge transfer sessions focusing on how to prepare workstations or mobile computers to run CentralSquare applications.

APPENDIX E: SAMPLE Implementation Timeline & Project Plan

Below is an example of CentralSquare's proposed timeline and project plan with proposed dates. Actual dates will be mutually agreed between both Customer & CentralSquare Project Managers.

Sample Project Timeline



Sample Project Plan

Task Name	Notes	Duration	Start	Finish
Upgrade Schedule				
Initiation		65 days	Wed 9/1/21	Tue 11/30/21
Sales to Service Transition Call	Deliver Project Initiation checklist to client.	1 hr	Wed 9/1/21	Wed 9/1/21
Notifying the Cloud Team	Creates a plan for CentralSquare's Cloud Team to spin up servers for client and schedule initial installation.	0.5 hrs	Thu 9/2/21	Thu 9/2/21
Project Timeline - Initiation & Scheduling	Creation of draft upgrade schedule and tentative scheduling for resources.	0.5 days	Thu 9/2/21	Thu 9/2/21
Project Timeline - Initiation	Creation of draft upgrade schedule and tentative scheduling for	2 hrs	Thu 9/2/21	Thu 9/2/21
GeoTRAK Update Routine - Scheduling	Scheduling plan and resource for GTUR	1.5 hrs	Thu 9/2/21	Thu 9/2/21
Citizen Engagement - Scheduling	Scheduling plan and resource for Citizen Engagement	4 hrs	Thu 9/2/21	Thu 9/2/21
Fusion - Scheduling	Scheduling plan and resource for fusion services	2 hrs	Thu 9/2/21	Thu 9/2/21
AnalyticsNOW Scheduling	Scheduling plan and resource for AnalyticsNOW	1 hr	Thu 9/2/21	Thu 9/2/21
Project Initiation Checklist	Central Square provides the client with a Project Initiation Checklist containing actions required by the client.	0.13 days	Wed 12/4/19	Wed 12/4/19
Project Initiation Checklist - Internal		1 hr	Wed 12/4/19	Wed 12/4/19
Project Initiation Checklist - External		0 hrs		
Project Timeline - Sign Off	Central Square provides the client with a draft timeline to review, provide feedback & sign off.	0.5 hrs	Thu 9/9/21	Thu 9/9/21
Planning		0.13 days	Mon 9/6/21	Mon 9/6/21
Kick-off Meeting	Client call to review SOW and next steps. Discuss questions related to Project Initiation Checklist.	1 hr	Mon 9/6/21	Mon 9/6/21
Monitoring & Controlling		56.85 days?	Wed 9/8/21	Fri 11/26/21
Initial Migration		10 days	Wed 9/8/21	Wed 9/22/21
Initial Migration - .NET Data	Data Conversion resource to review and complete conversion of TRAKiT.NET database to Community Development	1 day	Wed 9/8/21	Thu 9/9/21
Initial Migration - GeoTRAK Update Routine	Data Conversion Specialist reviews and updates client's existing LandTRAK script	16 hrs	Wed 9/8/21	Fri 9/10/21
Initial Migration - Custom Reports Conversion	CentralSquare completes conversion of 10 custom SSRS reports or as noted in the contract.	40 hrs	Wed 9/15/21	Wed 9/22/21
Installation - Pre-Prod		1 day	Fri 9/10/21	Mon 9/13/21
GIS Re-configuration - Pre-Prod		8 hrs	Fri 9/10/21	Mon 9/13/21
Fusion Installation - Pre-Prod	CentralSquare will setup pre-production instance of requested fusion services	4 hrs	Fri 9/10/21	Mon 9/13/21
AnalyticsNOW Installation - Pre Prod	CentralSquare will setup pre-production instance of AnalyticsNO	3 hrs	Fri 9/10/21	Mon 9/13/21
Initial Migration Testing		9.25 days	Tue 9/14/21	Tue 9/28/21
Initial Migration - Client Testing	Client to test initial migration and all related integrations. CentralSquare will provide client with a high level testing checklist, and recommends client create detailed test plan to ensure application, reports, forms, mail merge documents, 3rd	0 hrs	Tue 9/14/21	Tue 9/14/21
Initial Migration Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Tue 9/21/21	Tue 9/21/21
Initial Migration - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	1 day	Wed 9/22/21	Thu 9/23/21
GIS Re-configuration - Issue Resolution		2 hrs	Mon 9/27/21	Tue 9/28/21
Fusion Testing		4 hrs	Thu 9/16/21	Fri 9/17/21
Citizen Engagement - Consolidated Console Training		4 hrs	Fri 9/17/21	Mon 9/20/21
Installation - Test	CentralSquare install team will provide a test instance of the Community Development environment with all relevant integrations to allow testing of configuration changes or software updates before implementing in live system.	2.5 days	Tue 9/28/21	Thu 9/30/21
GIS Re-configuration - Pre-Prod		4 hrs	Tue 9/28/21	Tue 9/28/21
Fusion Installation - Test	CentralSquare will install all requested Fusion services in test environment	4 hrs	Thu 9/30/21	Thu 9/30/21
AnalyticsNOW Installation - Test	CentralSquare will install all AnalyticsNOW in test environment	3 hrs	Thu 9/30/21	Thu 9/30/21
Business Process Optimization (BPO)	The purpose for a Business Process Optimization is to review current workflows and to determine how to improve	17.63 days	Tue 9/28/21	Fri 10/22/21
Business Process Optimization (BPO) - Planning & Prep	Consultant prepares for Business Process Optimization using the prep checklist.	1 hr	Tue 9/28/21	Tue 9/28/21
Business Process Optimization (BPO)	Onsite training divided between instruction and guided experimentation	24 hrs	Thu 10/7/21	Tue 10/12/21
Business Process Optimization (BPO) - Follow-up	Consultant completes a formal BPO write-up	2 hrs	Wed 10/13/21	Wed 10/13/21
Business Process Optimization (BPO) - Configuration	Consultant configures test system based upon optimization changes determined during BPO.	11 hrs	Wed 10/20/21	Fri 10/22/21
Spatial Rules		18.88 days	Wed 10/20/21	Tue 11/16/21
Spatial Rules - Workbook Introduction		3 hrs	Wed 10/20/21	Thu 10/21/21
Spatial Rules - Workbook Review 1st		3 hrs	Thu 10/28/21	Thu 10/28/21
Spatial Rules - Workbook Review 2nd		3 hrs	Thu 11/4/21	Thu 11/4/21
Spatial Rules - Configuration		12 hrs	Thu 11/11/21	Tue 11/16/21
AnalyticsNOW		30.13 days	Thu 10/7/21	Thu 11/18/21
AnalyticsNOW - Overview	Pre-training preparation meeting	4 hrs	Thu 10/7/21	Fri 10/8/21
AnalyticsNOW - Administration training	Trainings client admin users on backend configuration of report writing product	4 hrs	Fri 10/8/21	Fri 10/8/21
AnalyticsNOW - Report Writing Training	Onsite training divided between instruction and guided experie	32 hrs	Tue 11/2/21	Mon 11/8/21
AnalyticsNOW - Project Management	Follow up after between trainings with client and consultant, review of after action reports, management of follow up items.	1 hr	Tue 11/9/21	Tue 11/9/21
AnalyticsNOW - Workshop or Report Development	Client option for 32 hours for an on-site guided workshop or an additional 32 hours of report development.	32 hrs	Tue 11/9/21	Mon 11/15/21
AnalyticsNOW - Training Review	Remote follow up session with AnalyticsNOW consultant for refresher training, questions, or issue resolution.	4 hrs	Wed 11/17/21	Thu 11/18/21
AnalyticsNOW - Training Followup	Consultant after action	4 hrs	Thu 11/18/21	Thu 11/18/21
AnalyticsNOW - Project Management	Follow up after on site training with client and consultant, review of after action reports, management of follow up items.	1 hr	Thu 11/18/21	Thu 11/18/21
Spatial Rules Testing		7 days	Wed 11/17/21	Fri 11/26/21
Spatial Rules - Client Testing	Client to test optimization	0 hrs	Wed 11/17/21	Wed 11/17/21
Spatial Rules - Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Wed 11/24/21	Wed 11/24/21
Spatial Rules - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions	8 hrs	Thu 11/25/21	Fri 11/26/21

SME Training		11.25 days	Fri 10/15/21	Mon 11/1/21
SME Training - Planning	Client project manager attends and participates in meeting to review plan for onsite SME Training. Central Square Technologies consultant/trainer reviews plan with client based	0.5 hrs	Fri 10/15/21	Fri 10/15/21
SME Training - Prep	Consultant/Trainer prepares for SME Training using the prep ch	0.5 hrs	Fri 10/15/21	Fri 10/15/21
SME Training	Client's SMEs attend and participate in training on how to use & test the delivered system.	32 hrs	Mon 10/25/21	Fri 10/29/21
SME Training - Citizen Engagement		2 hrs	Fri 10/29/21	Fri 10/29/21
SME Training - Fusion		10 hrs	Fri 10/29/21	Mon 11/1/21
SME Training - Follow Up	Consultant/Trainer completes the SME Training Followup checkl	1 hr	Mon 11/1/21	Mon 11/1/21
Optimization Testing	Consultant delivers test plan to the client. Consultant will inform client to log issues identified during the testing phase through CentralSquare's issue tracking system. CentralSquare Resources will work to resolve issues	7 days	Tue 11/2/21	Thu 11/11/21
Optimization - Client Testing	Client to test optimization	0 hrs	Tue 11/2/21	Tue 11/2/21
Optimization - Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Tue 11/9/21	Tue 11/9/21
Optimization - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	1 day	Wed 11/10/21	Thu 11/11/21
Go Live Readiness		1.25 days?	Mon 11/15/21	Tue 11/16/21
Go Live Checklist Complete		1 day?	Mon 11/15/21	Tue 11/16/21
GIS - Confirmation	GIS Tickets & Final GIS Site Review	1 hr	Mon 11/15/21	Mon 11/15/21
GeoTRAK Update Routine - Confirmation	confirming go live readiness for GTUR	1.5 hrs	Mon 11/15/21	Mon 11/15/21
Citizen Engagement - Confirmation	confirming go live readiness for Citizen Engagement	2 hrs	Mon 11/15/21	Mon 11/15/21
AnalyticsNOW - Confirmation	confirming go live readiness for AnalyticsNOW	0.5 hrs	Mon 11/15/21	Mon 11/15/21
Fusion - Confirmation	confirming go live readiness for all Fusion services	2 hrs	Mon 11/15/21	Mon 11/15/21
Testing Phase Ends	Client provides confirmation via email/Testing End Letter System Testing has been completed for Community Development and all related integrations. Once Client confirmation received, CentralSquare to start preparation for	0.5 hrs	Tue 11/16/21	Tue 11/16/21
Final Delivery Revisions List	Client will provide CentralSquare with a new list of issues identified during the testing phase.	1 hr	Tue 11/16/21	Tue 11/16/21
GeoTRAK Update Routine - Final	Data Conversion Specialist reviews and updates client's existing LandTRAK script	2 hrs	Tue 11/16/21	Tue 11/16/21
Final Delivery		0.5 days	Wed 11/17/21	Thu 11/18/21
Final Delivery - Data Migration	CentralSquare will provide responses/corrections to the issues submitted by the Client. The data migration is being completed in the pre-production account by the Data Conversion Team	1 hr	Wed 11/17/21	Wed 11/17/21
Final Delivery - Client Testing		0 hrs	Wed 11/17/21	Wed 11/17/21
Final Delivery - Configuration	the BPO configuration is moved from the test account to the pre-prod account by the Consultant Team. This will be the final configuration used once the client is live.	2 hrs	Wed 11/17/21	Wed 11/17/21
GIS - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	4 hrs	Wed 11/17/21	Thu 11/18/21
End User Training	CentralSquare will train all end users during the coordinated timeframes. By completion of training, all end users will be utilizing the latest release of TRAKiT.	14.25 days	Thu 11/4/21	Wed 11/24/21
End User Training - Planning	Client attends meeting to plan end user training.	0.5 hrs	Thu 11/4/21	Thu 11/4/21
End User Training - Prep	Central Square Technologies prepares for end user training based on End User Training Prep checklist.	0.5 hrs	Wed 11/17/21	Wed 11/17/21
End User Training	CentralSquare will train all end users during the coordinated timeframes. By completion of training, all end users will be utilizing their upgraded version of TRAKiT.	24 hrs	Thu 11/18/21	Tue 11/23/21
End User Training - Citizen Engagement		2 hrs	Tue 11/23/21	Tue 11/23/21
End User Training - Fusion		10 hrs	Tue 11/23/21	Wed 11/24/21
Project Closure		3.13 days	Thu 11/25/21	Tue 11/30/21
Go Live	CentralSquare resource(s) onsite to complete end-user training and take TRAKiT live.	3.13 days	Thu 11/25/21	Tue 11/30/21
Transition to Live	CentralSquare will process data for Go Live and deliver back to the Client's environment as outlined in the Go Live Readiness	1 hr	Fri 11/26/21	Fri 11/26/21
Go Live Support - Project Management		1 day	Mon 11/29/21	Tue 11/30/21
Go Live Support - Onsite		16 hrs	Thu 11/25/21	Mon 11/29/21
Go Live Support - GIS	GIS consultant will provide remote support to assist with any issues or questions during go live	2 hrs	Mon 11/29/21	Mon 11/29/21
End User Training and Go Live - Followup	Consultant/Trainer completes the End User Training Followup checklist.	1 hr	Tue 11/30/21	Tue 11/30/21

CST Signed CentralSquare Amendment to Agreement 12.23.22

Final Audit Report 2022-12-27

Created:	2022-12-27
By:	MARISOL ORDONEZ (marisol.ordonez@sanfordfl.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAA7zIftXOMAO63uk-92JFIxzSD7iJd-inK

"CST Signed CentralSquare Amendment to Agreement 12.23.22 " History

- Document digitally presigned by DocuSign\, Inc. (enterprisesupport@docusign.com)
  2022-12-23 - 3:19:36 PM GMT- IP address: 97.71.189.34

- Document created by MARISOL ORDONEZ (marisol.ordonez@sanfordfl.gov)
  2022-12-27 - 6:15:31 PM GMT- IP address: 97.71.189.34

- Document emailed to art.woodruff@sanfordfl.gov for signature
  2022-12-27 - 6:16:42 PM GMT

- Email viewed by art.woodruff@sanfordfl.gov
  2022-12-27 - 6:19:27 PM GMT- IP address: 172.225.248.228

- Signer art.woodruff@sanfordfl.gov entered name at signing as Art Woodruff
  2022-12-27 - 7:09:12 PM GMT- IP address: 97.71.167.55

- Document e-signed by Art Woodruff (art.woodruff@sanfordfl.gov)
  Signature Date: 2022-12-27 - 7:09:14 PM GMT - Time Source: server- IP address: 97.71.167.55

- Agreement completed.
  2022-12-27 - 7:09:14 PM GMT

CITY OF SANFORD FLORIDA

WS __ RM X
Item No. 8.F

CITY COMMISSION MEMORANDUM 23-009
~~AUGUST 8, 2022~~ AGENDA
January 9, 2023

TO:	Honorable Mayor and Members of the City Commission
PREPARED BY:	Angela Adkins, Administrative Support Supervisor Development Services
SUBMITTED BY:	Norton N. Bonaparte, Jr., ICMA-CM, City Manager
SUBJECT:	Budget Amendment for Building Reserve Fund

STRATEGIC PRIORITIES:

- ☐ Unify Downtown & the Waterfront
- ☐ Promote the City's Distinct Culture
- ☐ Update Regulatory Framework
- ☐ Redevelop and Revitalize Disadvantaged Communities

SYNOPSIS:

Approval of Resolution No. 3104, to amend the budget in an amount of $285,000 to increase the Building Fund account is being requested

FISCAL/STAFFING STATEMENT:

Funds are available in the Building reserves account. Funds will then be available in Building Funds.

BACKGROUND:

The Department is requesting a transfer of $285,000 for the project management, consulting, configuration, testing, training, and other work necessary for the implementation of the Central Square database. Implementing Central Square to replace Citizenserve would bring conformity and unification within all of the departments, increase the efficient processing of permitting, and enhance our accounting processes including the ability to give timely refunds.

LEGAL REVIEW:

No legal review requested of the City Attorney.

RECOMMENDATION:

It is Staff's recommendation that the City Commission approve Resolution No. 3104, to amend the budgets for $285,000 to increase the Building Division Funds.

SUGGESTED MOTION:

"I move to approve Resolution No. 3104, to amend the budget in an amount of $285,000 to increase the Building Division Funds."

Attachments: Resolution No. 3104
Budget Amendment

AMENDMENT TO THE CENTRALSQUARE SOLUTIONS AGREEMENT

This Amendment (the "Amendment") amends the CentralSquare Solutions Agreement entered into by and between CentralSquare Technologies, LLC ("CentralSquare") and the City of Sanford ("Customer") with an Execution Date of April 15, 2021 (the "Agreement") expressly as provided for in this Amendment.

The Effective Date of this Amendment is the latest date shown on the signature page of this Amendment.

WHEREAS, the Parties hereto desire to amend the Agreement to add CentralSquare's Community Development Cloud Solution on the terms and subject to the conditions set forth herein; and

WHEREAS, pursuant to Section twenty-three (23) of the Existing Agreement, the amendment contemplated by the Parties must be contained in a written agreement signed by an authorized Representative of each Party against whom the amendment is to be enforced.

NOW, THEREFORE, in consideration of the foregoing and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. Defined Terms. Except as otherwise set forth herein, each defined term in the Agreement has the meaning ascribed to that term in the Agreement when the term is used in this Amendment.

2. Amendment to the Existing Agreement. As of the Effective Date, the Existing Agreement is hereby amended or modified as follows:

    a. Section One (1) is hereby amended by adding the Community Development Solution to the Agreement.

    b. Exhibit One (1) of the Agreement is hereby amended by Adding Exhibit One (1) to this Amendment.

Miscellaneous

3. This Amendment is only applicable to the addition of the Community Development Solution, no other terms of the Solutions Agreement are intended to be modified.

4. This Amendment may be executed in counterparts, each of which is deemed an original, but all of which constitute one and the same agreement. Delivery of an executed counterpart of this Amendment electronically or by facsimile shall be effective as delivery of an original executed counterpart of this Amendment.

Integration Provision. Except as expressly modified by this Amendment, the Agreement shall remain in full force and effect. As of the Execution Date, the Agreement, as further amended by this Amendment constitutes the entire understanding of the parties as regards the subject matter hereof and cannot be modified except by written agreement of the parties.

CentralSquare Technologies, LLC	**City of Sanford, FL**
BY: DocuSigned by: Ron A Anderson 6769F1AD774045B...	BY: Art Woodruff (Dec 27, 2022 14:08 EST)
PRINT NAME: Ron A Anderson	PRINT NAME: Art Woodruff
PRINT TITLE: Vice President of Sales	PRINT TITLE: Mayor
DATE SIGNED: 12/23/2022	DATE SIGNED: Dec 27, 2022

Exhibit One

Community Development Project Cost Summary

WHAT SOFTWARE IS INCLUDED?

PRODUCT NAME	QUANTITY	UNIT PRICE	DISCOUNT	TOTAL
1. AnalyticsNOW Cloud Annual Access Fee	1	7,500.00		7,500.00
2. Bluebeam Server API for TRAKiT Annual Access Fee		2,100.00		2,100.00
3. Community Development: Advanced Annual Subscription Fee Saas	35	1,900.00	- 3,500.00	63,000.00
4. eTRAKiT Credit Card API Annual Access Fee		2,500.00		2,500.00
5. GIS Advanced Engine Subscription Saas Annual Subscription Fee Saas		5,500.00		5,500.00
6. TRAKiT API for Selectron IVR Annual Access Fee		3,500.00		3,500.00
7. TRAKiT Laserfiche API Annual Access Fee		1,200.00		1,200.00

Software Total	88,800.00 USD
Discount	-3,500.00 USD
Software Total	85,300.00 USD

WHAT SERVICES ARE INCLUDED?

DESCRIPTION	TOTAL
1. Community Development: Advanced Saas Subscription Cloud Setup Fee	10,000.00
2. Public Administration Consulting Services - As Incurred	61,200.00
3. Public Administration Data Conversion Services - As Incurred	30,240.00
4. Public Administration Development Services - As Incurred	17,640.00
5. Public Administration GIS Services - As Incurred	17,100.00
6. Public Administration Project Management Services - As Incurred	28,080.00
7. Public Administration Technical Services - As Incurred	8,280.00
8. Public Administration Training Services - As Incurred	24,660.00

Services Total 197,200.00 USD

QUOTE SUMMARY

Software Subtotal	88,800.00 USD
Services Subtotal	197,200.00 USD
Quote Subtotal	286,000.00 USD
Discount	- 3,500.00 USD
Quote Total	282,500.00 USD

WHAT ARE THE RECURRING FEES?

TYPE	AMOUNT
FIRST YEAR MAINTENANCE TOTAL	0.00
FIRST YEAR SUBSCRIPTION TOTAL	85,300.00

The amount totals for Maintenance and/or Subscription on this quote include only the first year of software use and maintenance. Renewal invoices will include this total plus any applicable uplift amount as outlined in the relevant purchase agreement.

Community Development Payment Terms

ONE TIME FEES

a. CentralSquare Cloud Setup Fee ($10,000) is due upon Execution of this Amendment.
b. CentralSquare Professional Services Fees are due as incurred on a time materials basis.

c. RECURRING FEES
d. The Annual Subscription Fee is due on the Execution Date for Year One, and annually thereafter on the anniversary of the Execution Date. In Years Two and Three, the Annual Subscription fee is subject to an annual increase of 4%. Beyond year Three, the Annual Subscription Fee is subject to a 5% increase. This is applicable if this Amendment is Executed by December 31, 2022. If this Amendment is not signed by December 31, 2022, the annual uplift amount for the Annual Subscription Fee will be 5%.

e. The Annual Access Fee is due on the Execution Date for Year One, and annually thereafter on the anniversary of the Execution Date. In Years Two and Three, the Annual Access fee is subject to an annual increase of 4%. Beyond year Three, the Annual Access Fee is subject to a 5% increase. This is applicable if this Amendment is Executed by December 31, 2022. If this Amendment is not signed by December 31, 2022, the annual uplift amount for the Annual Access Fee will be 5%.

ANCILLARY FEES

f. Reimbursement of travel and living expenses will be governed by Exhibit 3 ("**Travel Expense Guidelines**") attached hereto and will be invoiced monthly in arrears and due within thirty (30) days from date of invoice.
g. Customer is responsible for paying all taxes relating to this Agreement. Applicable tax amounts (if any) are not included in the fees set forth in this Agreement. If Customer is exempt from the payment of any such taxes, Customer must provide CentralSquare valid proof of exemption; otherwise, CentralSquare will invoice Customer and Customer will pay to CentralSquare all such tax amounts.
h. If Customer fails to make any payment when due, then CentralSquare may charge interest on the past due amount at the rate of 1.5% per month calculated daily and compounded monthly, or, if lower, the highest rate permitted under applicable law; and If such failure continues for 90 days following written notice thereof, CentralSquare may suspend performance or access until past due amounts have been paid.

Implementation Statement of Work

Project: Sanford, FL – Community Development (Q-97329)

CentralSquare is implementing a configurable, commercially available, off-the-shelf solution. The parties mutually agree and acknowledge this Statement of Work (SOW) is to be a planning document, not the detailed requirements or design of the solution.

Project Start Date

Parties agree the Project Kickoff Meeting will be scheduled within thirty (30) days from the Effective Date of the Agreement.

Scope of Project

The project includes the CentralSquare core system Community Development as detailed in Appendix A of this SOW.

Services Scope

The following outlines the proposed methodology for the project management, consulting, configuration, testing, training, and other services work necessary for the implementation of the contracted products, with all components delineated in the Agreement. Details related to the activities for each application included in this project can be found in Appendix A of this SOW.

Project Teams

Project teams from all parties will include functional experts, technical resources, and decision makers. Resource management is critical to success, for all parties. CentralSquare and the Customer agree to make all necessary arrangements to ensure resources are available at each stage to ensure timelines are met. CentralSquare uses a RACI (Responsible, Accountable, Consulted, and Informed) chart to outline the expectations from each member of the team, from all parties. CentralSquare's RACI Chart can be found in Appendix B of this SOW.

Project Management Methodology

The implementation is conducted by a cross-functional team of experts from several departments within CentralSquare led by the assigned Project Manager. A phased approach to project management is followed to ensure the critical services are consistent and results are achieved. Phases include:

Initiation: This phase includes the contract execution and transition to the Service Delivery team. CentralSquare may schedule an all-team meeting to kick off the project. The kickoff meeting will include time for the project managers from both teams to review all contractual documentation and begin the process of finalizing the integrated project schedule.

Planning: During the planning phase, the project managers from both teams will meet to discuss all tasks and resources necessary to successfully complete implementation. The project team from CentralSquare will be finalized, project governance will be established, and a communications plan will be drafted and shared with the parties.

Deliverables during the planning phase include the integrated baseline project schedule, communications plan, resource plan, and governance plan.

Monitor and Control: Throughout the project, the project managers will work together on monitoring and controlling the overall project health. This includes regular status meetings/reports, quality reviews, managing risks/issues, and managing resources. Project managers will work together to manage the overall timeline, scope, and respective budgets, as well as ensuring the customer's objectives are being met along the way. Any items determined to be out of scope will be immediately addressed by Central Square and customer Project Manager.

Project governance is essential to establishing a decision making and communications model for the project. Key stakeholders will be identified by all parties and regular status meetings will be scheduled to review the project health, risks to timeline/budget, and issues that may block forward progress.

Deliverables during this phase include regular status reports, risk/issue log, regular stakeholder meetings, and all project schedule updates.

Project Close Out: The final stage of the project includes an introduction and transition to the Customer Support team and the Customer Success team. During transition, the project managers will work together to conduct an audit of tasks and deliverables associated with the project. Any mutually agreed upon delayed deliverables will be scheduled for post go-live and documented. Any contracted post go-live activities will be reviewed and scheduled as necessary before transition to Customer Support.

Implementation Methodology

CentralSquare Professional Service Consultants and Project Manager follow a standard implementation approach divided into stages throughout the course of the project. Several types of services and resources (defined herein) will be used during each stage to complete the necessary steps for successful deployment of the contracted services. The Services aligned to implementation include Consulting, Technical and Installation, Data Conversion, and Training. The implementation methodology is a four-stage approach that includes:

Analysis: During this stage of the implementation, CentralSquare Consultants will meet with the Customer's functional experts to review the current workflows of key functions impacted by this project and the contract software. Decisions related to configuration will be documented in the CentralSquare Decision Workbooks for each major product and delivered to the customer for review and concurrence. Where necessary, CentralSquare Data Conversion Specialists will meet with the data experts from the Customer and review the contracted elements for conversion. Deliverables during this stage include the Decision Workbooks for each product and the data mapping for conversion.

Configuration: Using the decisions documented in the Decision Workbooks during the Analysis stage, CentralSquare will begin work with the customer to configure the system. CentralSquare will also work with the customer functional experts, as needed, to configure interfaces and complete data conversion. All admin level workshops will be completed during the configuration stage of the project: Customer should ensure key project resources are available for consultation and workshops; and customer should be prepared to host training in adequate environments. Appendix A will define workshops specific to this project and deliverables as applicable during this stage.

Testing: It is expected there will be modifications to current customer processes to align to the functionality of the newly contracted products; as such, validation through appropriate reasonable testing at various stages is critical to a successful deployment. CentralSquare uses an iterative testing approach to ensure the configurations are properly set to achieve the desired outcomes. During the testing stage of the project, the project teams will work together to ensure workflows and business processes are aligned to the application functionality. Once testing is complete, application user training will begin (see the appendix for an overview of training included in this project). Deliverables during the testing stage include Test Plans and Go-Live Readiness assessments.

Deployment: Once the project passes the Go-Live Readiness assessment, final planning for Go-Live takes place. This will include completing end user training, defining a communications plan for Go-Live, and defining a Go-Live schedule that is mutually accepted. Deliverables during the deployment stage include a go-live plan, cutover schedule, and communications plan.

Professional Services

Consulting Services: Include both interactive and independent engagements with CentralSquare subject matter experts on the various applications and functions. Types of activities included in Consulting Services are customer workflow analysis, application workshops, and configuration assistance. Also included in the consulting activities are engagements aimed at supporting the customer with testing and go-live activities. More detail on the engagement related to Consulting Services related to this project can be found in Appendix A.
A successful consultation includes multiple platforms of learning and training; therefore, the customer will provide ample workspace in order to be successful in this type of engagement. Network connections, training facilities that include computers, projectors, Wi-Fi access, recommended network configurations in place, and scheduling considerations are imperative so that all who would benefit from collaboration and training may attend.

Technical Services: Provides technology consulting at the infrastructure layer including CentralSquare applications requirements for servers, operating systems, and other various supporting products like SQL and Active Directory. Technical Services are engaged in tasks related to interfaces and integration implementation configuration and knowledge transfer. Refer to Appendix A for contracted Technical Services.

Technical Services also includes activities related to hardware installation (as necessary) and the initial software installation of CentralSquare applications. This includes the services for the provisioning of additional environments for the contracted applications: application environments included in this contract are Production (Pre-Production during implementation), Training/Testing, and Data Conversion (where applicable).

- The Pre-Production environment will become the Production environment upon Go-Live. All activities related to configuration, testing, and training will take place in the Pre-Production environment. Prior to Go-Live, CentralSquare will scrub the Pre-Production environment of all training and testing data and prep for Production Go-Live.
- The Data Conversion environment will be provisioned to align with the Pre-Production environment. This environment will be used as a working/staging environment for data conversion activities during implementation. Once the data conversion activities are complete, the environment will be decommissioned.
- The Training/Test environment will be provisioned in the weeks leading up to Go-Live in an effort to minimize the additional work needed to keep environments aligned.

Once the Training/Testing environment has been completed, and the Production environment is live, the ongoing maintenance for configuration alignment between the two environments will be the responsibility of the Customer.

Communication
Project Status Cadence Meetings: Project status cadence meetings, scheduled as determined by the CentralSquare and Customer Project Managers, establish the status of the project; achievements over a defined iterative period, risk mitigation, issue review, and assurance of awareness of upcoming activities. Continuity in the meeting schedule is critical to early intervention of risks and issues. Project Status and Issues/Risks Reporting: In addition to the regularly scheduled Project Status Meetings, the CentralSquare Project Manager provides two key types of reports as part of the Communication Plan.

The Project Status Report, distributed to key stakeholders at a frequency to be determined based on the needs of the Customer (typically bi-weekly or monthly), summarizes milestones completed, as well as recent and upcoming project activity.

The Issues Log updated continually by the CentralSquare Project Manager, tracks entry and management of project issues identified by CentralSquare or the Customer. Log entries include status updates, action items, and responsibilities of both parties. Risks and issues tracking log adjustments are mutual agreement by the CentralSquare and Customer Project Manager.

The Customer and CentralSquare agree that the individuals designated in the final project plan are essential to the services offered pursuant to this Agreement. The Customer and CentralSquare should anticipate challenging issues to arise throughout the implementation process due to the nature and complexity of projects of this type. For expedient remedying of challenging issues, the Customer and CentralSquare will use the following dispute resolution process.

All communication regarding the project directed to CentralSquare's Project Manager and the Customer's Project Manager maintain consistent communication between the parties. Regularly scheduled project status meetings maintain open communication between the CentralSquare and Customer Project Manager.

All issues or concerns are to be openly and actively discussed between CentralSquare's Project Manager and the Customer's Project Manager prior to any escalation.

If issues begin to interfere with the progression of the implementation project, the Customer and/or CentralSquare Project Manager should escalate challenges to senior management representatives.

Escalation to CentralSquare management is as follows:
Customer will provide escalation personnel to CentralSquare Project Manager during Kick-Off phase of the project.

Data Conversion Services: CentralSquare uses an iterative and collaborative approach to data conversion. This includes the initial data analysis, data mapping, and performing sample conversions for validation prior to executing the final conversion into Production. CentralSquare will provide training on the proper use of CentralSquare's data mapping tools to the customer's appropriate staff. CentralSquare consultants will work with the customer to ensure a thorough understanding of the validation requirements necessary to evaluate converted data for completeness and accuracy. Finally, CentralSquare Data Conversion Consultants will provide a final plan for converting data into the Production environment aligned to the Go-Live schedule and will review this plan with the appropriate customer staff.

For a successful data conversion, the customer will provide the necessary dataset in one of the following formats: SQL, Microsoft Excel, Microsoft Access, or delimited flat file. While CentralSquare will collaborate with the customer staff on the best practice approach to validation of converted data, it is ultimately the responsibility of the customer to ensure the validation is prioritized for timely completion and data is verified for accuracy. Up to three iterations of translation, conversion, and review are performed for each dataset; therefore, it is imperative to have sufficient time allotted for effective review at each iteration. Detailed documentation in writing will be required from the customer staff for any discrepancies or issues found during the data review. See Appendix A for the data conversion contracted for this project.

Training Services
Utilizing a global methodology for user training across all product lines ensures the preparation, documentation, and delivery of training is effective across all of CentralSquare branded core applications, add-ons, and interfaces. Training sessions can occur through multiple vehicles such as live-online, e-learning on demand, and face-to-face classroom settings. CentralSquare Consultants work with customer administration and subject matter experts to establish a training plan to include the course objectives, schedule, location(s), and participants.

CentralSquare provides a hands-on, interactive approaches to user training: End-User and Train-the-Trainer.

- End-Users are defined as employees who will access the application(s) on a regular basis to perform their daily activities. End-User classes incorporate various functions based on realistic scenarios focused on process using the applications inherent tools to ensure productive use of the system at and after Go-Live. Topics in End-User courses will include data entry, searching, reporting, and application navigation.
- Train-the-Trainer courses are designed to prepare the Customer's trainers to conduct End User training. CentralSquare uses a teach and teach-back approach for Train-the-Trainer to allow for our Consultants to evaluate the Trainer's knowledge and ability to convey methodology appropriate to the use of the CentralSquare applications.

Successful trainings rely on the customer to dedicate assigned personnel to attend sessions limiting the interruptions of normal work duties. To ensure training is most successful the Customer will provide appropriate classrooms, facilities, connectivity (networks and lines to data terminals), devices with system software installed, and related equipment/materials to support each training class. With a hands-on and interactive approach to training, every effort should be made to include one full-function workstation per student, one full-function workstation for the instructor, necessary projection equipment, a whiteboard, and network connectivity. Every attendee should have the prerequisite skill sets, operations knowledgebase, and dedicated time to complete follow-up tasks after the completion of the training. See Appendix A for an overview of End-User training associated with this project.

APPENDIX A: Application Deployment Strategies

PRODUCT: Community Development

Analysis:

To begin, we jointly perform a comprehensive analysis of your current state processes related to core system functionality. In this stage we also begin the process of data conversion by analyzing your legacy data. Significant tasks include:

Major Task	*Description*
Business Process Review	Consultant meets with different areas of Community Development reviewing and analyzing all key business processes. All sessions will be discussions on processes relating to that area within Community Development. Deliverable: Community Development Formal BPR Report and Recommendations.
Workbook Introduction	The consultant will introduce and walk through the workbooks which will be used to capture the existing state of the client's applicable Community Development modules.
Data Migration Mapping	The consultant will work closely with the agency's legacy data expert, to review the source data and map it to the proper target data field in Community Development

Monitor & Control:

During this phase, the consultant has become familiar with your configuration requirements, processes, and current workflows. With this knowledge, we will deliver your configured system and converted legacy data into your new pre-production environment. Next, our consultant will provide guidance as you begin iterative testing that will continue throughout the remainder of the implementation. Also, our data conversion team guides you through testing your converted data and Admin training begins. Significant tasks include:

Major Task	*Description*
The Work-Booking Process	The Consultant will work with the client remotely across multiple sessions to refine the workbooks to a final state of acceptance.
System Configuration	CentralSquare Technologies configures system according to signed Decision Workbooks. Client provides additional information as needed.
Python Scripting and Geo Database Delivery	The GIS Specialist builds Python scripting by GEOTYPE (example: Parcel, Address, Street) based on the Land Management Workbook to gather required data to populate the appropriate Community Development database tables for initial delivery and installation at the client's site.Upon completion of the scripting, the GIS Specialist delivers the GEO database to the Database Specialist for inclusion in the initial delivery of the client's testing database.
Configuration Validation	CentralSquare Consultant completes the Configuration Validation checklist of the system to verify system is configured to meet the requirements.
Admin Skills Workshops	Training classes, designed as hands-on workshops, include building code tables, picklists, system settings, and assignment of security permissions. Designed for supervisors, system administrator, and staff with decision-making authority. Please see below for more details.

Modules included	*Definition of Module*
Property Data & Ownership Management	Land Management is at the heart of our system, providing comprehensive land data obtained from the assessor's office to ensure accuracy. Users can conduct a preliminary screening of a property and then link a project, permit, or code complaint case directly through Land Management. Combined with industry-leading GIS technology, users receive the power of database technology with digital maps and aerial photos to provide a graphical view of the land record. This allows the agency to be proficient in performing spatial analysis (i.e., recognizing areas with several code

violations, expiring permits, different zoning criteria) by obtaining the reporting information graphically on the map.

CAPABILITIES INCLUDE:

- View any related County Assessor data
- View related records associated with a parcel
- View GIS details with a single click
- See all subdivisions, land splits, annexations, and site mergers
- View owner details
- Create a permit, project, case or license on a land record
- Control parcels, buildings, addresses, and street segments
- Add a warning or lock down a land record
- Manage property inspections
- Define address naming conventions
- Research property and building details
- Print owner merge letters and notifications
- Execute dynamic queries
- Keep historical records

Geographical Information System Mapping

State-of-the-art ESRI GIS Integration allows all development activities such as permits, projects, land management, code enforcement, licensing, and inspections to be managed directly from the parcel fabric. Central Square Community Development leverages your agency's ESRI GIS to enable users to visually search the map for development activity and display results in reports. GIS Integration offers enhanced user controls, allowing users to view related records associated with the parcel, create permits, and code cases directly from the map, and even run a query to illustrate search results.

This allows the agency to become more efficient in recognizing areas with several code violations, expiring permits, or different zoning criteria. Rather than running different reports, this information can be graphically represented on the map.

CAPABILITIES INCLUDE:

- Contractors can pay fees for associated permits
- See all subdivisions, land splits, annexations, and site mergers
- Control parcels, buildings, addresses, and street segments
- Manage property inspections
- Define address naming conventions
- Research property and building details
- Create and save spatial bookmarks
- Use multiple internal and public map services
- Use measurement and drawing tools
- Run radius notifications and print owner letters
- Use Network Analyst for routing and directions
- Execute dynamic queries and perform spatial analysis
- Select multiple parcels to combine into a project, permit, or case
- Search or create a permit, project, case, or complaint from the map
- Use common Microsoft Bing maps and Google Street View features

Planning & Zoning

Planning & Zoning manages the workflow for all types of projects, from application to review and approval. The system records all assigned actions and any conditions of approval for future evaluation. Attachment capability allows users to scan plans with mark-ups and link them as part of a project's history.

A time clock function automatically schedules critical points along a project's timeline. This ensures all reviewers stay on target. User-definable screens allow administrators to easily create additional screen templates to track and record unique information.

CAPABILITIES INCLUDE:

- Track phone calls, emails, or letters
- Track reviews in timesheet
- Project review cycles and notes
- Attach different iterations of plans with mark-ups
- Inspection tracking
- Contact management
- Conditions for approval maintained on project
- Detailed reports for fee information, project tree, and more
- Event scheduler for meeting dates, e. g., Planning Commission
- Automatic assignment of reviews
- Unique fee schedule for each application type
- Track engineering and public works projects
- Direct interface to GIS for project management
- Issue multiple permits from a single project
- Create annexations and subdivisions

Permitting & Inspections

Streamline your agency's permitting process by tracking the unique workflows for all types of permits. The Permitting module captures everything your users need, from contact management, related permits, plan review tracking, inspector scheduling, and financial details.

Permits tracked in this module are customized according to your agency's workflow requirements, including permit type, status queues, valuation details, review types, action types, customizable screens, inspection requirements, and fee schedules. Your agency can incorporate unique procedures to ensure timelines are met efficiently, reports are executed properly, and managers are alerted when necessary.

CAPABILITIES INCLUDE:

- Unique workflow for each permit type
- Schedule inspectors by region, permit type, or inspection type
- Review related cases, projects, sites, or permits
- Compare multiple permits side by side
- Manage permit reviews and conditions
- Unlimited user-defined search options
- Warning flags for outdated contractor licenses
- Copy/duplicate information from another permit
- Require previous inspections
- Create unique job valuations
- User-defined standard comments
- Incorporate unique fee schedules

- Issue permit forms and Certificates of Occupancy
- Use inspection checklists
- Generate public Twitter notifications of permit activity

Code Compliance

Code Compliance provides incident and activity management while tracking the workflow for all types of code enforcement activities, from the time a complaint is received through resolution of the incident. When a complaint or violation is entered on a property, Code users have the option to lock down the parcel record and place a flag on all records associated with the property.

Users can maintain contact information and attach images and documents to each issue. Administrators can create user-defined screens to track and record information unique to your agency. This data can be merged into reports, forms, and other documents.

CAPABILITIES INCLUDE:

- Create cases from GIS map
- Lock down parcel when certain case types are created
- Track all activity dates
- Follow multiple violations on a code case
- Incorporate all code text into TRAKiT for easy reference
- Attach photos and letters to records
- Email notifications
- Link to different records
- Create Case Details report
- Repeat important dates
- Protect all information from non-officer staff
- Track all phone calls, emails, or letters
- Capture unique information on user-defined screens
- Identify addresses using Google street view
- Generate notice of violations and warning letters

Business & Regulatory Licensing

Licensing issues and tracks a variety of license types, including animal, business, and facilities. Your agency can tailor several fields to your needs, including license types, classification codes, ownership types, and more. At a glance, users can quickly review all information pertinent to a specific record.

The system maintains insurance details to track workers' compensation, liability insurance, and state business licensing information. Automatic batch processes can send out renewal notices before due dates, and the system processes renewal fees. Reports can display the number of unresolved licenses and show any fees collected.

CAPABILITIES INCLUDE:

- Maintain all contact information associated with a license
- Allow for online management for citizens
- Custom-tailored fields and screens
- Manage all activities and reviews
- Batch process for renewal notices
- Proration and penalty fees automatically calculated
- Assign conditions for a business
- Associate fees unique to each license type
- Move licensee information into AEC TRAK directory

- Link license to a specific parcel
- View records related to a license, e.g., permit
- Attach documents and photos
- Track all insurance and registration information
- Check off educational courses completed
- Unique licensing requirements and workflows

Directory for Architects, Engineers & Contractors

AEC Entity provides instant access to all information associated with people who frequently have business with the agency, as it relates to permits and projects. Any type of professional can be tracked, including architects, engineers, contractors, and surveyors to name a few. Common information associated with these contacts can be viewed quickly from a single screen.

You can access license and insurance information, associated contacts, and related records from AEC Entity. Simply look up the professional or business to associate them as a contact in another module. As a result of AEC's directory integration, users will be prompted prior to adding contacts if there is a warning flag or any outdated insurance information.

CAPABILITIES INCLUDE:

- Contractors can pay fees for associated permits
- All insurance carrier information can be inserted
- Warning flags prompt users about expired information
- Preview all associated records with the contact
- Chronologically track any communication with contractors
- Maintain license information
- Link to business license information
- Track multiple insurance carriers
- Attach photos and proof of insurance to records
- Internet link provided for state licensing information
- Send emails or text message to individuals
- Add new permits and projects from the AEC record
- Restrict information from certain users

Customer Relations Management

The CRM module provides the tools you need to quickly capture and manage citizen issues. Users can effectively monitor, and track issues received through the phone or internet. The system logs opened and closed issues as well as their exact location. Users can also link recurring issues and complainants to ensure issues are handled in an appropriate manner.

Workflow activity tracking is designed with built-in processing and features to help users resolve various issues presented by their citizens. Administrators can customize workflows according to pre-existing or new processes. Users can identify the exact location of an incident by using the GIS map.

CAPABILITIES INCLUDE:

- Route issues for response
- Filter search results
- Link issues to existing cases or permits
- Capture complainant details
- Use GIS map for pin-pointing exact location
- Audit log to ensure staff accountability
- Transfer workflows into other applications within the agency
- Built-in workflow functionality

- Auto-send emails or letters
- Create a code enforcement case from a reported incident
- Run reports to determine response times
- Track all details associated with the work order
- View entire history of the location
- Route workflows to different departments

Online Portal for Contractors & Residents

eTRAKiT is a public facing portal that provides access to permit, project, license, code, land, and inspection information. Citizens can request inspections, pay fees, upload plans apply for permits and much more through eTRAKiT.

eTRAKiT offers different profile permissions including anonymous searching as well as restricted access to additional details based on the user's role. Contractors have additional functions that enable them to request inspections for their projects. Additionally, if your jurisdiction uses outside plan review agencies or inspectors, eTRAKiT enables them to use back office functions through the portal such as entering results or uploading files.

FEATURES

- Apply for permits, projects, and licenses online
- Schedule inspections and review online
- Update license information and pay renewal fees
- Upload application details and submit plans online
- Access to records based on user permissions and profile
- Map-based parcel and address search based on jurisdictions GIS.
- Configure your online portal to match your municipal website
- Outside agencies including plan reviewers and external inspectors can enter data online in an Agency Center
- Contractors have access to record details specific to their role with a historical view of their accounts
- Online payment plugins for variety of payment providers including

  1. Authorize.Net
  2. CardConnect
  3. CardKnox
  4. CSJ (JetPay)
  5. Elavon (Converge)
  6. PayFlowLink (PayPal)
  7. Paymentus
  8. USA ePay
  9. CentralSquare Payments

Mobiles

Inspectors and officers can carry information about permits, code enforcement cases, and related inspections on their iPad, Android, or smartphone. Inspectors can modify the inspection status, enter inspection results and notes, schedule inspections, and more, all while in the field.

The Mobiles app allows remote users the flexibility to use CentralSquare from an iPad or Android device even without a constant wireless connection.

Mobile PDA allows access to the same details provided in the office, from smaller devices such as smartphones and tablets.

FEATURES

- Result scheduled inspections
- Use standard comments
- Modify, schedule, and route inspections

- View attachments
- View and update contact information
- View fee details
- To-do list of inspections for defined date range
- Add a warning or hold to a property
- View custom screens unique to each record type and add information
- Mapping location uses
- Microsoft Bing
- Find permits, projects, cases, or licenses through ad hoc search functionality
- Contractor access to request inspections
- Inspection checklists
- Play recorded messages
- Send notifications via email

Admin Skills Workshops

Workshop training classes, designed as hands-on workshops, include building code tables, picklists, system settings, and assignment of security permissions. Designed for supervisors, system administrator, and staff with decision-making authority, these workshops kick off the application configuration process for designated project committee members. These classes generally are limited to six participants (or as determined by mutual agreement of the CentralSquare and Customer Project Managers) and should be attended by those responsible for maintaining user information and code tables, as well as by subject-matter experts in the specific application area. Class time focuses on beginning the building process under the guidance of the assigned CentralSquare trainer, as well as to discuss CentralSquare recommendations regarding potential configuration options as identified during the Functional Analysis Workshop.

Class Title	# of Classes	Training Type	Intended Audience	Topics	Location
Subject Matter Expert Training	1	Hands-on, Instructor-led Training	System Admins, Client SMEs & Core Team Members	General Navigation, Overview of each module is included, review of client's testing strategy	Remote
Admin Training	1	Hands-on, Instructor-led Training	System Admins	Covers all modules, designed to train local administrators of the system and covers all areas of configuration with the system	Remote
Cognos Report Writing Training	1	Hands-on, Instructor-led Training	Staff with some forms & report building experience preferred, but not required	Covers basic report development and using the Cognos report building system, as well as how to manage and run completed reports	Remote

CUSTOM REPORT DEVELOPMENT:

The Report Development team will work directly with the Client to identify reports to be created. The reports will be chosen by the client in conjunction with the number of hours available for this task. CentralSquare will scope the requested reports and assign hours to each. The Client will then choose and prioritize the reports that are to fit into the available hours. Hours assigned to each report will include specifications, development of the report, and modifications (within scope). Delivery of the reports will be made as they are completed and approved.

DATA CONVERSION:

The data conversion process will start with mapping the client's legacy data from CitizenServe into the Community Development production database format. The process includes three major data refreshes, including the final cut-over for Go Live and any number of minor changes to correct small issues, such as spelling or placement of data within Community Development. The conversion program will be designed to run while the target database is in full operation; however, because of the volume of data being processed, it will be ideal to execute the conversion during a window of minimal usage. Data conversion contracted for this project includes 5 years of the following data:

Modules To be Converted	*Definition of Module*
Permitting	Legacy permit data currently in the local government agency's current system of record. Generally, this is data representing the agency's construction or remodeling projects for properties within the agency's jurisdiction. It is intended to ensure that the project plans comply with local, state, and national building and construction regulations
Planning & Zoning	Legacy planning & zoning data currently in the local government agency's currently system of record. Generally, this is data representing the agency's development and design of land use and the built environment, including air, water and the infrastructure passing into and out of the agency's jurisdiction. It is intended to ensure that the land use and zoning changes comply with local standards for land use, zoning, and urban planning
Code Compliance	Legacy case data currently in the local government agency's current system of record. Generally, this is data representing the agency's regulatory compliance violations for properties within the agency's jurisdiction. It is intended to ensure that the properties conform to the rules and standards set forth in the agency's municipal code of ordinances
Business & Regulatory Licensing	Legacy business licenses data currently in the local government agency's current system of record. Generally, this is data representing the agency's Regulatory Licenses, which are permits issued by the agency that allow individuals or companies to conduct business within the agency's jurisdiction. It is intended to ensure that the businesses conform to the rules and standards set forth in the agency's municipal code of ordinances and/or the state's regulatory rules
Land Parcel Management	The land parcel data commonly includes details of the ownership, precise location, dimensions, and value of individual parcels of land, within the agency's jurisdiction. It is intended to provide comprehensive land details obtained from the agency's source GIS system or Assessor's office, to ensure accuracy
Customer Relations Management	Legacy data that contains historical communications primarily from property owners within the agency's jurisdiction and generally consists of questions, issues, or complaints
Entity Management	The entity data commonly includes details of individuals and businesses that interact with the agency, on a regular recurring basis. It is intended to provide the agency with a quick reference source of contractor, engineer and tradesmen that can be linked to activities within the Community Development system

INTEGRATION/INTERFACES:

Integrations and/or interfaces included in this project include:

[Remove interfaces not included]

Integration/Interface	**Use of System**	**Type / Frequency**	**Import/ Export**	**Interface Method / Future Functionality**
Integrated Voice Response (IVR)	Processing inspection scheduling and related transactions using 3P IVR solutions	On Demand	Import/ Export	File Based DLL / 3rd party IVR hardware, software & services must be contracted separately

Integration/Interface	Use of System	Type / Frequency	Import/ Export	Interface Method / Future Functionality
Laserfiche (DMS) – On premise	Processing documents between Community Development and 3P document management solutions	On Demand	Export	File Based DLL
Financial Batch Export	Queries system for payments and creates a file to be processed in a 3rd party GL	Batch / Nightly	Export	SQL Stored Procedure & SSRS Report
Land Parcel Management Update Routine	Ensures the land parcel data within the system, stays up to date	Batch / Nightly	Import	File Based DLL
Bluebeam	Opens and saves PDFs within the system for plans review and markup	On Demand		File Based DLL
ESRI GIS - Standard	Uses a published rest endpoint from ESRI to display map data with the system	On Demand	Import	Web Services
Online Payment Gateway ***<see Note * a. below>***	Interface for credit card payment processing	On Demand	Import/ Export	File Based DLL
Over the Counter Payment Gateway ***<see Note * b. below>***	Interface for credit card payment processing	On Demand	Import/ Export	File Based DLL

Notes:

* Client will need to contract with a new payment provider, to accept payments over the counter (OTC) and/or online and provide credentials to CentralSquare within 30 days of project initiation.

a. Supported online Payment Providers
    i. Authorized.Net
    ii. USA ePay
    iii. Elevon (Converge)
    iv. PayFlowPro (PayPal)
    v. Paymentus
    vi. Cardknox
    vii. CardConnect
    viii. CSI (JetPay)
    ix. CentralSquare Payments
b. Supported over the counter Payment Providers
    i. Paymentus
    ii. Cardknox

Testing:

Testing will assess your team's readiness for Go Live. This includes knowledge transfer, end user training, and change management significant tasks include:

Major Task	*Description*
Testing	The testing phase is an iterative process, conducted by the client, to help the consultants check the quality of the legacy data conversion and review the configuration decisions made during the discovery phase of the project. This phase is especially important to ensure a smooth transition before the system launches.
Go Live Support	This session will be used to provide support for Go Live. The topic will be determined by client needs. *See Go Live below.*

TRAINING:

Within Testing and Deployment, End-user training is completed.

End-User Training

End-user training provides hands-on, process-based instruction focusing on key tasks related to users' job responsibilities. With the decision to choose CentralSquare facilitated training, an instructor provides training on the chosen contracted solutions. End-user classes incorporate extensive activities based on realistic scenarios focusing on processes and tools within the applications for productive use of the system at and after Go-Live. These classes generally are limited to 10-12 participants (or as determined by mutual agreement of the CentralSquare and Customer Project Managers). Agendas for each module will be based on specific configuration and workflows established during the implementation. Topics in end-user classes will include data entry, searching, reporting, and application navigation.

Core Solution	# of Classes	Training Type	Intended Audience	Topics	Location
End User Training	1	Hands-on, Instructor-led Training	All Users of the ComDev System	General Navigation, End to end training of each module based on the specific configuration and workflows established during the implementation	Remote

Other Training Events

Training Type	# of Classes	Training Type	Intended Audience	Topics	Location
Data Querying	1	Hands-on, Instructor-led Training	Data SMEs	How to create ad-hoc reports using tools within the application.	Remote

Deployment:

Starts with the completion of your production environment. Then, we conduct a mock Go Live. Finally, once both teams agree on readiness, we Go Live. Significant tasks include:

Major Task	*Description*
Configure Production Environment	CentralSquare Consultant completes the Configuration Validation checklist of the system to verify system is configured to meet the requirements.
Plan Cutover Schedule and Comunications	Describes tasks to be handled by CentralSquare and Customer personnel during the initial cutover to Go-Live, including a detailed schedule of CentralSquare personnel covering each shift with resources, process for reporting issues, how they will be handled or escalated, contact names/phone numbers onsite staff, remote and third-party vendors.
Execute Go Live	The Client transitions from their legacy system to the Community Development system and conducts their normal day-to-day business.
Go Live Support	This session will be used to provide support for Go Live. The topic will be determined by client needs. *See Go Live below.*

GO LIVE (additional information):

CentralSquare offers a variety of Go-Live services to augment the Customer's staff during the transition from the legacy product to the CentralSquare solution. Included in this project, the Project Managers will work together to create a Go-Live Plan to include a schedule of events, resource allocation, communications plan, and issue log. Additionally, CentralSquare will support the Go-Live with the following services:

Type of Resource; Role	Number of Days	Onsite or Remote

Consultant: Supporting staff during go live event	2	Remote
CentralSquare Project Manager; Supporting project during go live event	As Needed	Remote

Definitions:

Key Deliverables	Description	Frequency	Owners
Project Management Plan	Guides the project management team to monitor and control expectations, budget, scope, schedule, communication, and quality.	Finalized during the Planning phase during discussions about Project team and timeline	CentralSquare Project Management Team
Project Schedule	Identifies tasks to be completed during the life cycle of the project including the key SOW tasks, resources, durations, milestones, and delivery dates	An updated schedule will be provided as needed	CentralSquare Project Mgr. and Customer Project Manager
Communication Plan	Describes the key project team members from CentralSquare and Customer Executives to Subject Matter Experts, includes, roles and responsibilities, and contract information	Provided at Kick-off and updated as required	CentralSquare Project Manager
Decision Workbook	Workbook that contains customer decisions regarding processes and system configurations.	Provided at Kick-off and updated as required	CentralSquare Consultant
Monthly Status Report	Following regular status meetings, the CentralSquare PM will provide an updated status report	Determined by Customer need during kickoff	CentralSquare Project Manager and Customer Project Manager
Issues Log	Tracks risks and issues, Assignments, progress, mitigation strategies, due dates, and other relevant information for managing risks and issues	Determined by Customer need during kickoff	CentralSquare Project Manager and Customer Project Manager

Risk Register	Classifies the risk based on probability and impact to the overall project and develops mitigation and response plans, where appropriate.	Maintained throughout the course of the Project	CentralSquare Project Manager and Customer Project Manager
Implementation Guide	End-to-end summary of engagements that make up the CST implementation.	Provided at Kick-off and referred to throughout the project	CentralSquare Project Manager
Test Workbook	Workbook that contains all test and assessment cases completed during the implementation.	Provided at Kick-off and updated as required	CentralSquare Project Manager
Go Live Plan	Describes tasks to be handled by CentralSquare and Customer personnel during the initial cutover to Go-Live, including a detailed schedule of CentralSquare personnel covering each shift with resources, process for reporting issues, how they will be handled or escalated, contact names/phone numbers onsite staff, remote and third-party vendors.	A draft will be provided prior to Go-Live, reviewed with the Customer, and finalized for distribution to stakeholders	CentralSquare Project Manager and Customer Project Manager
Services to Support/CSM Project Closeout Report	The delivery of formal closing documents as part of acceptance includes completed project artifacts outlined above, change order summary, lessons learned and recommendations, risk and issues log, customer support transition plan, and description of steady state operations.	Provided at the end of the project	CentralSquare Project Manager

APPENDIX B: RACI Chart

- **R**esponsible (Who is/will be doing this task?)
- **A**ccountable (Who is the decision maker?)
- **C**onsulted (Anyone/stakeholders that can talk about it.)
- **I**nformed (Whose work depends on this task/needs to be kept up to date?)

	Sales	Project Management			RMO		Service Delivery						GIS		Cloud Services		Cust Success	Support	Customer			
	Account Executive	PMO Senior Leadership	PM Manager	Project Manager	RMO Leadership	Resource Planner	SD Senior Leadership	SD Manager	Trainer	Consultant	Installation Specialist	Data Conversion Specialist	GIS Manager	GIS Specialist	Cloud Team Leadership	Cloud Team	Cust Success Manager	Support Analyst	Customer Sponsor	Customer PM	Cust Functional Leads	Customer SME's
Phase 1: Initiation																						
Assigning a Project Manager			R, A	I				I														
Sending Introductory Email to Customer				R, A				I												I		
Performing Contract / Project Setup and Intelligence Review			C	R, A				I														
Sizing a Project for Velocity			C	R, A				C														
Requesting an Implemenation Guide			C	R, A																		
Building Project Folder				R, A																		
Building Initial Draft of Project Artifacts			C	R, A																		
Initially Contacting Third Party Vendors				R, A																		
Requesting Work From the Cloud Team				R, A				I							I	I						
Sending Welcome Package to Customer				R, A						I									I	I	I	I
Conducting Sales to Service Transition Call	C		C	R, A				C	I	I	I	I	C	I		I						
Initially Calling Customer				R, A						I									I	C	I	I
Drafting Initial Project Timeline				R, A		I		C		I									I	C	C	C
Completing Project Initiation Checklist				R, A															I	C	C	C
Phase 2: Planning																						
Performing Project Kickoff	I	I	C	R, A			I	C	C	C	C	C	C	C	I	I			C	C	C	C
Scheduling Resources			I	C	C	R		A,C	I	I	I	I	C	I		I						
Reviewing Project Plan with Customer				R, A						I									I	C	C	C
Receiving Project Plan Customer Signoff		I	I	R, A	I	I	I	I	I	I	I	I	I	I	I	I			C	C	C	C
Completing Project Planning Checklist				R, A															I	C	C	C
Phase 3: Monitor & Control																						
Conducting Cadenced Status Meetings				R, A					C	C	C	C		C		C				C	C	C
Completing Monthly Status Reporting		I	I	R, A			I	I	C	C	C	C	I	C	I				I	I		
Performing Issue Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			I	C	C	C
Performing Risk Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			C	C	C	C
Performing Change Control Management				R, A															C	C	C	C
Performing Change Management				C															R, A	R	R	R
Performing Project Health Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			I	C	C	C
Performing Executive Stakeholder Management		I	C	R, A			I	C	C	C	C	C	C	C	I	C			C	C	I	I
Preparing for Go-Live		I	C	R, A			I	C	C	R	R	C	C	C	C	C	I	I	I	C	C	C
Conducting Go-Live	I	I	C	R, A			I	C	C,R	R	R	R	C	R		R			I	C	C	C
Stage 1: Analysis																						
Workflow Analysis			I	I			I	C	C	R	A	C	C	C					I	C	C	C
Analyze Technical and Functional Requirements			I	I			I	C	C	R	A	C	C	C					I	C	C	C
Data Migration Mapping			I	I			I	C	I	A	C	R	C	C					I	C	I	C
Stage 2: Configuration																						
Build Environment				I			I	I	I	A	R		C	C					I	I	C	C
Configure Environment									C	R	C		C	C					I	I	C	C
Unit Testing				A						R	C		C	C					I	I	C	C
Adminstrative Workshops									R	C			I	I					I	I	C	C
Data Conversion				I				I		A	C	R	I	C					I	I	I	I
Stage 3: Testing																						
Testing				I				I		R	C									I	C	C
Fix Issues and Retest				I				C		R	A	C									C	C
System Sign-Off				A				I		R	C		I	C					I	C	C	C
Knowledge Transfer/User Training				I				I	R													
Go-Live Readiness				A				I		R									I	I	I	I
Stage 4: Deployment																						
Configure Production Environment			I	I			I	I		C	R										C	C
Plan Cutover Schedule and Communications				R				C		C	C								I	C	C	C
Pre-Launch Testing								I		R	C											
Go-Live + Communication		I	C	R				C		C	C								I	I	I	I
Phase 4: Closeout																						
Completing Transition to Support and CSM		I	I	R, A			I	I	I	I	I	I	I	I			R	R		C	C	C
Delivering Post Go-Live Items				R, A					R	R	R	R		R								
Performing Post Go-Live Issue Resolution				R, A					R	R	R	R		R		R		R				
Conducting Closeout Meeting with Customer				R, A															I	C	C	C
Performing Contract Reconciliation				R, A					I													
Completing Lessons Learned		I	C	R, A	I	C	I	C	C	C	C	C	C	C	I	C	I	I				
Archiving Project Folder				R, A																		
Performing Management Review			C	R, A																		
Closing Project in OpenAir				R, A																		
Completing Project Closeout Checklist				R, A																		

APPENDIX C: General GIS Requirements

Introduction

Community Development includes a property record application where users can look up current parcel activity and information related to the parcel. The GIS Module is at the heart of the system and provides comprehensive land data obtained from either the assessor's office or the client's GIS data to ensure accuracy. Users can conduct a preliminary screening of a property and then link a project, permit, code enforcement case, or license record directly through GIS Module.

The GIS integration requires map services to be provided and maintained by the client, and our Land Management Update Routine (LTUR) performs a one-way update process pushing updates to the Community Development data daily/weekly/monthly outside of business hours.

GIS Data Requirements

All GIS feature classes, also referred to as layers, must have correct geometry in an Esri-recognized local projection. The client is responsible for providing and maintaining GIS data in a consistent format, including the feature class name, location, field schema, projection, etc. Unique types of features, such as parcels, must be provided and maintained in single feature classes. For example, if the client's jurisdiction is crosses two counties who provide street data, the client will need to combine both street data feature classes into a singular layer.

The Land Management Workbook, to be completed by the client, maps the field in the client's GIS data to the appropriate fields in the Community Development database enabling them to appear in the system. Data attribute requirements are limited; however, missing attributes will result in empty values for the associated attributes in the system. A limited number of user-defined fields are available in the system to enable the client to include attributes that our outside of the standard fields.

GeoTypes

GeoTypes are the core GIS features integrated into Community Development and include any of the following features:

- Parcels: required
- Address Points: recommended
- Streets: recommended
- Others can be discussed with the GIS Specialist during the initial consultation

A dedicated ID field (string data type) is required for each GeoType feature class except for parcels, which should use the Assessor's ID for that purpose. Each ID value must be unique across GeoTypes, and the ID and other critical fields are required to be present in the primary published map service. Condominiums may be represented with stacked parcels.

Boundary / Polygon Layers

Typical boundary layers include zoning, city limits, historical districts, flood zones, etc. A limited number of spatial joins can be configured by CentralSquare to add attributes from boundary data to the GeoTypes to enable full functionality. The most common example is joining the zoning layer to the parcel data.

For clients with the GIS Advanced license, geography-based Spatial Rules triggering fees, reviews, inspections, and more during the creation of permits, projects, code cases and licenses are based on the relationship between GeoType Layers and others. The client is required to supply any polygon layers that are to be used to designate areas impacted by Spatial Rules.

ArcGIS Enterprise (Server) Requirements

Community Development requires map services to be published with Esri's ArcGIS Enterprise or ArcGIS Server. The ArcGIS instance does not need to be solely dedicated to this purpose but must meet the requirements below.

- ArcGIS Enterprise versions 10.3.1 to 10.8 *(check with CentralSquare on later version compliance)*
- Authentication/Security
    - The client must provide CentralSquare with login credentials for an ArcGIS Portal User
    - Web-tier authentication using Windows Authentication is not supported for cloud clients; however, on premise clients with version 18.2 HF09 or later may utilize this.
    - SAML based Active Directory based Federation is not supported. However, Portal for ArcGIS can use built-in account.
- If Community Development is to be hosted by CentralSquare, the client's map services must be available externally through the web. This typically requires the ArcGIS Web Adapter to reside in the client's DMZ.
    - CentralSquare will require built-in user's admin credentials for map rendering and source of data for Land Management Update Routine.
    - SAML and Web-tier based authentication will not be supported. Development work in progress.

ArcGIS Online

ArcGIS Online may be used to provide map services as an alternative to ArcGIS Server for the Standard GIS License only. **NOTE: ArcGIS Online is not supported for the GIS Advanced license/Spatial Advisor and the eTRAKiT map.**

ArcGIS Map Service Requirements

The Community Development GIS integration relies on ArcGIS map services that are created and maintained by the client.

Map Service Rules and Requirements

- Community Development requires an Admin Portal user and password to consume REST URLs from a portal. An ArcGIS Online user may be provided as alternative if the service is not to be used for the GIS Advanced licenses/Spatial Advisor or eTRAKiT.
- Map services must be available externally through the web for Cloud clients.
- All map services must start with Layer (0) and run consecutively without gaps between layer numbers
- Additional service-specific requirements are outlined below

Required Map Services

The client is required to provide a minimum of three dedicated ArcGIS map services. Those and additional optional services are outlined below.

1. Feature Map Service

This map services provides the GIS data necessary to populate and maintain the data in the Community Development's Geo Tables in the cloud SQL database. This service must include all layers to be integrated with Community Development. Feature access must be enabled with Query/Data operations allowed, and all layers must be in same projection.

2. GeoType Map Service

The GeoType Map Service is used to provide access to ESRI feature class data in the management of the Community Development Software. Feature access must be enabled, and all layers must be in same projection.

3. Display Map Service

The Display Map Service provides an interactive view map in the application. The client should build this map service with the symbology, scaling, and layer order that will provide end users the best and most complete experience. This service requires a geometry service and a printing service

4. Optional Display Map Services

Other map services can be added to Community Development's Map Viewer to provide more mapping functionality to your users, in a view-only mode. This service requires a geometry service and a printing service.

Additional Details:

- Aerial Photos:
  - Must be a tiled, cached map service.
  - Image Services are not supported.
- Community Development's Map Viewer supports Street View and Bird's View with a valid Google map key. Clients will need to provide this key and add the Community Development URL as a valid referrer.
- Map services can be specific to departments within your organization, such as public works, utilities, recreation facilities, etc.
- Community Development's Map Viewer can support:
  - Routing services via Network Analysis Server
  - Geocoding services

APPENDIX D: Cloud Services (Cloud Services - AWS)

CentralSquare and Customer will conduct the following as part of this project.

SAAS

Tasks	Name	Description	Customer Role	CentralSquare Role
1.	Creation	Initial Creation of CentralSquare's Community Development software	• Attend Discovery Call	• Discovery Call • Complete install and data migration
2.	Test Account Creation	Test Account Creation is the creation of the test account which is cloned from the pre-production environment.	• Validate Account	• Create Test Account

Assumptions

- CentralSquare will migrate all Customer data into the Community Development database and confirm that the Community Development software's primary system functions are available.
- CentralSquare will install the Community Development software into our Public Government Cloud environment, managed by our Cloud services team centers and provide access to the Customer through a standard URL. We will also provide a VPN device to access the URL to secure Customer required third-party integrations identified for this project.

- CentralSquare will complete all work remotely
- CentralSquare will create one (1) Production Account and one (1) Test Account as part of the Agreement. Additional accounts will require additional hours added under separate quote by mutual written agreement at CentralSquare's prevailing rates.

Roles and Responsibilities

CentralSquare:

- Load files and perform initial configuration of all licensed CentralSquare applications, including base and add-on modules, and interfaces to third-party applications. Configuration includes activating appropriate modules, table set up, and selection of mandatory configuration settings based on combination of CentralSquare applications purchased.
- Set up test environment as mirror copy of the production environment.
- Conduct a test to verify that CentralSquare applications have been installed and configured successfully, operating properly, and are ready to begin the implementation and configuration process. Note: Not all CentralSquare components may be ready at this point, for a full test, but a reasonable effort ensures CentralSquare components are ready for the next step in the process. CentralSquare installation services will ensure that all needed components are prepared and ready prior to conducting subsequent activities for the specific application area according to the agreed upon Project Schedule.

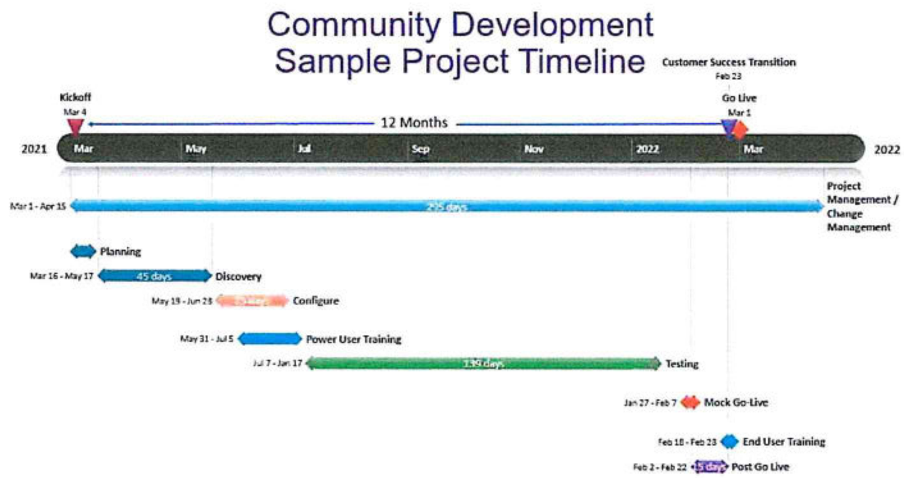
Customer:

- Participate in planning activities (conference calls, emails) with CentralSquare Application Installation Consultant and Technical Lead.
- Provide access to Customer's servers (including third-party) as required for CentralSquare Technical Lead and Application Installation Consultant to perform installation and migration tasks.
- Attend knowledge transfer sessions focusing on how to prepare workstations or mobile computers to run CentralSquare applications.

APPENDIX E: SAMPLE Implementation Timeline & Project Plan

Below is an example of CentralSquare's proposed timeline and project plan with proposed dates. Actual dates will be mutually agreed between both Customer & CentralSquare Project Managers.

Sample Project Timeline



Sample Project Plan

Task Name	Notes	Duration	Start	Finish
Upgrade Schedule				
Initiation		**65 days**	**Wed 9/1/21**	**Tue 11/30/21**
Sales to Service Transition Call	Deliver Project initiation checklist to client.	1 hr	Wed 9/1/21	Wed 9/1/21
Notifiying the Cloud Team	Creates a plan for Central Square's Cloud Team to spin up servers for client and schedule initial installation.	0.5 hrs	Thu 9/2/21	Thu 9/2/21
Project Timeline - Initiation & Scheduling	Creation of draft upgrade schedule and tentative scheduling for resources.	0.5 days	Thu 9/2/21	Thu 9/2/21
Project Timeline - Initiation	Creation of draft upgrade schedule and tentative scheduling for	2 hrs	Thu 9/2/21	Thu 9/2/21
GeoTRAK Update Routine - Scheduling	Scheduling plan and resource for GTUR	1.5 hrs	Thu 9/2/21	Thu 9/2/21
Citizen Engagement - Scheduling	Scheduling plan and resource for Citizen Engagement	4 hrs	Thu 9/2/21	Thu 9/2/21
Fusion - Scheduling	Scheduling plan and resource for fusion services	2 hrs	Thu 9/2/21	Thu 9/2/21
AnalyticsNOW Scheduling	Scheduling plan and resource for AnalyticsNOW	1 hr	Thu 9/2/21	Thu 9/2/21
Project Initiation Checklist	Central Square provides the client with a Project Initiation Checklist containing actions required by the client.	0.13 days	Wed 12/4/19	Wed 12/4/19
Project Initiation Checklist - Internal		1 hr	Wed 12/4/19	Wed 12/4/19
Project Initiation Checklist - External		0 hrs		
Project Timline - Sign Off	Central Square provides the client with a draft timeline to review, provide feedback & sign-off.	0.5 hrs	Thu 9/9/21	Thu 9/9/21
Planning		**0.13 days**	**Mon 9/6/21**	**Mon 9/6/21**
Kick-off Meeting	Client call to review SOW and next steps. Discuss questions related to Project Initiation Checklist.	1 hr	Mon 9/6/21	Mon 9/6/21
Monitoring & Controlling		**56.88 days?**	**Wed 9/8/21**	**Fri 11/26/21**
Initial Migration		10 days	Wed 9/8/21	Wed 9/22/21
Initial Migration - .NET Data	Data Conversion resource to review and complete conversion of TRAKiT.NET database to Community Development	1 day	Wed 9/8/21	Thu 9/9/21
Initial Migration - GeoTRAK Update Routine	Data Conversion Specialist reviews and updates client's existing LandTRAK script	16 hrs	Wed 9/8/21	Fri 9/10/21
Initial Migration - Custom Reports Conversion	CentralSquare completes conversion of 10 custom SSRS reports or as noted in the contract	40 hrs	Wed 9/15/21	Wed 9/22/21
Installation - Pre-Prod		1 day	Fri 9/10/21	Mon 9/13/21
GIS Re-configuration - Pre-Prod		8 hrs	Fri 9/10/21	Mon 9/13/21
Fusion Installation - Pre-Prod	CentralSquare will setup pre-production instance of requested fusion services	4 hrs	Fri 9/10/21	Mon 9/13/21
AnalyticsNOW Installation - Pre-Prod	CentralSquare will setup pre-production instance of AnalyticsNC	3 hrs	Fri 9/10/21	Mon 9/13/21
Initial Migration Testing		9.25 days	Tue 9/14/21	Tue 9/28/21
Inititial Migration - Client Testing	Client to test initial migration and all related integrations. CentralSquare will provide client with a high level testing checklist, and recommends client create detailed test plan to ensure application, reports, forms, mail merge documents, 3rd	0 hrs	Tue 9/14/21	Tue 9/14/21
Inititial Migration Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Tue 9/21/21	Tue 9/21/21
Initial Migration - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	1 day	Wed 9/22/21	Thu 9/23/21
GIS Re-configuration - Issue Resolution		2 hrs	Mon 9/27/21	Tue 9/28/21
Fusion Testing		4 hrs	Thu 9/16/21	Fri 9/17/21
Citizen Engagement - Consolidated Console Training		4 hrs	Fri 9/17/21	Mon 9/20/21
Installation - Test	CentralSquare install team will provide a test instance of the Community Development environment with all relevant integrations to allow testing of configuration changes or software updates before implementing in live system.	2.5 days	Tue 9/28/21	Thu 9/30/21
GIS Re-configuration - Pre-Prod		4 hrs	Tue 9/28/21	Tue 9/28/21
Fusion Installation - Test	CentralSquare will install all requested Fusion services in test environment	4 hrs	Thu 9/30/21	Thu 9/30/21
AnalyticsNOW Installation - Test	CentralSquare will install all AnalyticsNOW in test environment	3 hrs	Thu 9/30/21	Thu 9/30/21
Business Process Optimization (BPO)	The purpose for a Business Process Optimization is to review current workflows and to determine how to improve	17.63 days	Tue 9/28/21	Fri 10/22/21
Business Process Optimization (BPO) - Planning & Prep	Consultant prepares for Business Process Optimization using the prep checklist.	1 hr	Tue 9/28/21	Tue 9/28/21
Business Process Optimization (BPO)	On-site training divided betweOnen Instruction and guided experimentation	24 hrs	Thu 10/7/21	Tue 10/12/21
Business Process Optimization (BPO) - Follow-up	Consultant completes a formal BPO write-up.	2 hrs	Wed 10/13/21	Wed 10/13/21
Business Process Optimization (BPO) - Configuration	Consultant configures test system based upon optimization changes determined during BPO.	11 hrs	Wed 10/20/21	Fri 10/22/21
Spatial Rules		18.88 days	Wed 10/20/21	Tue 11/16/21
Spatial Rules - Workbook Introduction		3 hrs	Wed 10/20/21	Thu 10/21/21
Spatial Rules - Workbook Review 1st		3 hrs	Thu 10/28/21	Thu 10/28/21
Spatial Rules - Workbook Review 2nd		3 hrs	Thu 11/4/21	Thu 11/4/21
Spatial Rules - Configuration		22 hrs	Thu 11/11/21	Tue 11/16/21
AnalyticsNOW		30.13 days	Thu 10/7/21	Thu 11/18/21
AnalyticsNOW - Overview	Pre-training preparation meeting	4 hrs	Thu 10/7/21	Fri 10/8/21
AnalyticsNOW - Administration Training	Training select admin users on backend configuration of report writing product	4 hrs	Fri 10/8/21	Fri 10/8/21
AnalyticsNOW - Report Writing Training	On-site training divided between instruction and guided experin	32 hrs	Tue 11/2/21	Mon 11/8/21
AnalyticsNOW - Project Management	Follow up after between trainings with client and consultant, review of after action reports, management of follow up items.	1 hr	Tue 11/9/21	Tue 11/9/21
AnalyticsNOW - Workshop or Report Development	Client option for 32 hours for an on-site guided workshop or an additional 32 hours of report development	32 hrs	Tue 11/9/21	Mon 11/15/21
AnalyticsNOW - Training Review	Remote follow up session with AnalyticsNOW consultant for refresher training, questions, or issue resolution.	4 hrs	Wed 11/17/21	Thu 11/18/21
AnalyticsNOW - Training Followup	Consultant after action	4 hrs	Thu 11/18/21	Thu 11/18/21
AnalyticsNOW - Project Management	Follow up after on site training with client and consultant, review of after action reports, management of follow up items.	1 hr	Thu 11/18/21	Thu 11/18/21
Spatial Rules Testing		7 days	Wed 11/17/21	Fri 11/26/21
Spatial Rules - Client Testing	Client to test optimization	0 hrs	Wed 11/17/21	Wed 11/17/2
Spatial Rules - Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Wed 11/24/21	Wed 11/24/21
Spatial Rules - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	8 hrs	Thu 11/25/21	Fri 11/26/21

SME Training		11.25 days	Fri 10/15/21	Mon 11/1/21
SME Training - Planning	Client project manager attends and participates in meeting to review plan for onsite SME Training. Central Square Technologies consultant/trainer reviews plan with client based	0.5 hrs	Fri 10/15/21	Fri 10/15/21
SME Training - Prep	Consultant/Trainer prepares for SME Training using the prep ch	0.5 hrs	Fri 10/15/21	Fri 10/15/21
SME Training	Client's SMEs attend and participate in training on how to use & test the delivered system.	32 hrs	Mon 10/25/21	Fri 10/29/21
SME Training - Citizen Engagement		2 hrs	Fri 10/29/21	Fri 10/29/21
SME Training - Fusion		10 hrs	Fri 10/29/21	Mon 11/1/21
SME Training - Follow Up	Consultant/Trainer completes the SME Training Followup checkl	1 hr	Mon 11/1/21	Mon 11/1/21
Optimization Testing	Consultant delivers test plan to the client. Consultant will inform client to log issues identified during the testing phase through CentralSquare's issue tracking system. CentralSquare Resources will work to resolve issues	7 days	Tue 11/2/21	Thu 11/11/21
Optimization - Client Testing	Client to test optimization	0 hrs	Tue 11/2/21	Tue 11/2/21
Optimization - Cut-Off	Client creates tickets for any issues found during initial migration testing by this date	0 hrs	Tue 11/9/21	Tue 11/9/21
Optimization - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	1 day	Wed 11/10/21	Thu 11/11/21
Go Live Readiness		1.25 days?	Mon 11/15/21	Tue 11/16/21
Go Live Checklist Complete		1 day?	Mon 11/15/21	Tue 11/16/21
GIS - Confirmation	GIS Tickets & Final GIS Site Review	1 hr	Mon 11/15/21	Mon 11/15/21
GeoTRAK Update Routine - Confirmation	confirming go live readiness for GTUR	1.5 hrs	Mon 11/15/21	Mon 11/15/21
Citizen Engagement - Confirmation	confirming go live readiness for Citizen Engagement	3 hrs	Mon 11/15/21	Mon 11/15/21
AnalyticsNOW - Confirmation	confirming go live readiness for AnalyticsNOW	0.5 hrs	Mon 11/15/21	Mon 11/15/21
Fusion - Confirmation	confirming go live readiness for all Fusion services	2 hrs	Mon 11/15/21	Mon 11/15/21
Testing Phase Ends	Client provides confirmation via email/Testing End Letter System Testing has been completed for Community Development and all related integrations. Once Client confirmation received, CentralSquare to start preparation for	0.5 hrs	Tue 11/16/21	Tue 11/16/21
Final Delivery Revisions List	Client will provide CentralSquare with a new list of issues identified during the testing phase.	1 hr	Tue 11/16/21	Tue 11/16/21
GeoTRAK Update Routine - Final	Data Conversion Specialist reviews and updates client's existing LandTRAK script	2 hrs	Tue 11/16/21	Tue 11/16/21
Final Delivery		0.5 days	Wed 11/17/21	Thu 11/18/21
Final Delivery - Data Migration	CentralSquare will provide responses/corrections to the issues submitted by the Client. The data migration is being completed in the pre-production account by the Data Conversion Team	1 hr	Wed 11/17/21	Wed 11/17/21
Final Delivery - Client Testing		0 hrs	Wed 11/17/21	Wed 11/17/21
Final Delivery - Configuration	The BPD configuration is moved from the test account to the pre-prod account by the Consultant Team. This will be the final configuration used once the client is live	2 hrs	Wed 11/17/21	Wed 11/17/21
GIS - Issue Resolution	CentralSquare resources will work through issues documented in Freshdesk to provide resolutions.	4 hrs	Wed 11/17/21	Thu 11/18/21
End User Training	CentralSquare will train all end users during the coordinated timeframes. By completion of training, all end users will be utilizing the latest release of TRAKiT.	14.25 days	Thu 11/4/21	Wed 11/24/21
End User Training - Planning	Client attends meeting to plan end user training	0.5 hrs	Thu 11/4/21	Thu 11/4/21
End User Training - Prep	Central Square Technologies prepares for end user training based on End User Training Prep checklist.	0.5 hrs	Wed 11/17/21	Wed 11/17/21
End User Training	CentralSquare will train all end users during the coordinated timeframes. By completion of training, all end users will be utilizing their upgraded version of TRAKiT.	24 hrs	Thu 11/18/21	Tue 11/23/21
End User Training - Citizen Engagement		2 hrs	Tue 11/23/21	Tue 11/23/21
End User Training - Fusion		10 hrs	Tue 11/23/21	Wed 11/24/21
Project Closure		**3.13 days**	**Thu 11/25/21**	**Tue 11/30/21**
Go Live	CentralSquare resource(s) onsite to complete end user training and take TRAKiT live.	3.13 days	Thu 11/25/21	Tue 11/30/21
Transition to Live	CentralSquare will process data for Go Live and deliver back to the Client's environment as outlined in the Go Live Readiness	1 hr	Fri 11/26/21	Fri 11/26/21
Go Live Support - Project Management		1 day	Mon 11/29/21	Tue 11/30/21
Go Live Support - Onsite		16 hrs	Thu 11/25/21	Mon 11/29/21
Go Live Support - GIS	GIS consultant will provide remote support to assist with any issues or questions during go live	2 hrs	Mon 11/29/21	Mon 11/29/21
End User Training and Go Live - Followup	Consultant/Trainer completes the End User Training Followup checklist.	1 hr	Tue 11/30/21	Tue 11/30/21

CST Signed CentralSquare Amendment to Agreement 12.23.22

Final Audit Report 2022-12-27

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