DRAFT CONSULTANT SERVICES AGREEMENT BETWEEN THE CITY OF SUNNYVALE AND CATALYST CONSULTING GROUP, INC. FOR IMPLEMENTATION OF A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM

THIS AGREEMENT, dated ________________________, is by and between the CITY OF SUNNYVALE ("CITY"), a California chartered municipal corporation, and CATALYST CONSULTING GROUP, INC. (“CONSULTANT") an Illinois corporation.

WHEREAS, CITY is in need of specialized service in relation to the implementation of a Customer Relationship Management (CRM) System; and

WHEREAS, CITY advertised a Request for Proposals (RFP) F25-215 on March 6, 2025 for Software and Implementation Services for a Customer Relationship Management Software Systems Environment; and

WHEREAS, CONSULTANT submitted a proposal on April 22, 2025; and

WHEREAS, in reliance upon CONSULTANT’s representations regarding its qualifications, CITY finds that CONSULTANT possesses the skill and expertise to provide the required services;

NOW, THEREFORE, THE PARTIES ENTER INTO THIS AGREEMENT.

1. Services by CONSULTANT

CONSULTANT shall provide services in accordance with Exhibit "A" entitled “Scope of Work”. All exhibits, including all associated attachments, are attached hereto and incorporated herein by reference. CONSULTANT shall determine the method, details and means of performing the services.

2. Time for Performance

The term of this Agreement shall be two (2) years from the execution date, unless otherwise terminated in accordance with Section 17 below. CONSULTANT shall deliver the agreed upon services to CITY as specified in Exhibit "A". Extensions of time may be granted by the City Manager as an amendment in accordance with Section 18 below.

3. Duties of CITY

CITY shall supply to CONSULTANT any documents or information available to CITY and required by CONSULTANT for performance of the services. Any materials provided shall be returned to CITY upon completion of the work.

4. Compensation

CITY agrees to pay CONSULTANT as full compensation for the services rendered pursuant to this Agreement, the amounts set forth in Exhibit “B”. Unless the Parties mutually agree to modify this Agreement in accordance with Section 18 below, compensation shall not exceed the amounts set forth for each element listed in Exhibit “B”. In no event shall the total amount of compensation payable under this Agreement for the required scope of work exceed Seven Hundred Eight Thousand Nine Hundred Forty-Five and No/100 Dollars ($708,945.00), and compensation payable under this Agreement for the optional services defined in Exhibit B, Subsection B, shall not exceed Sixty-Five Thousand and No/100 Dollars ($65,000.00). Additional Services, if any, shall be authorized in writing by City’s project manager, in accordance with and subject to the provisions of Section 4, Compensation, and Exhibit “B” (Compensation Schedule) subsection C (Additional Services), and shall not exceed twenty-seven thousand dollars ($27,000.00). In no event shall the total amount of compensation payable under this Agreement exceed Eight Hundred Thousand Nine Hundred Forty-Five and No/100 Dollars ($800,945.00).

CONSULTANT shall submit invoices to CITY no more frequently than monthly for services provided to date. All invoices, including detailed backup, shall be sent to City of Sunnyvale, attention Accounts Payable, P.O. Box 3707, Sunnyvale, CA 94088-3707 or accountspayable@sunnyvale.ca.gov. Payment shall be made within thirty (30) days upon receipt of an accurate, itemized invoice by CITY's Accounts Payable Unit.

5. Wage Rates

CONSULTANT shall comply with the City's the minimum wage set forth in Section 3.80.040 of the Sunnyvale Municipal Code.

6. Ownership of Documents

CITY shall have full and complete access to CONSULTANT's working papers, drawings and other documents during progress of the work. All documents of any description prepared by CONSULTANT shall become the property of the CITY at the completion of the project and upon payment in full to the CONSULTANT. CONSULTANT may retain a copy of all materials produced pursuant to this Agreement.

7. Conflict of Interest

CONSULTANT shall avoid all conflicts of interest, or appearance of conflict, in performing the services and agrees to immediately notify CITY of any facts that may give rise to a conflict of interest. CONSULTANT is aware of the prohibition that no officer of CITY shall have any interest, direct or indirect, in this Agreement or in the proceeds thereof. During the term of this Agreement, CONSULTANT shall not accept employment or an obligation which is inconsistent or incompatible with CONSULTANT'S obligations under this Agreement.

CONSULTANT'S duties and services under this agreement shall not include preparing or assisting the CITY with any portion of CITY'S preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the CITY. The CITY shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of this project. CONSULTANT participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications. CONSULTANT shall cooperate with CITY to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by contractor pursuant to this agreement.

Pursuant to CITY's Conflict of Interest Code, Council Policy 7.3.7, CITY has determined that, depending on the position, certain individuals performing services under this Agreement may be required to file a Statement of Economic Interest (Form 700), which can be found at www.fppc.ca.gov. If applicable, to facilitate electronic submittal of Form 700, CONSULTANT shall send the following information to cityclerk@sunnyvale.ca.gov: 1) first and last name(s) of CONSULTANT's employee(s); 2) email address(es) of CONSULTANT's employee(s); 3) date when CONSULTANT's employee(s) will begin work under this contract; and 4) (if known) date when CONSULTANT's employee(s) will cease work under this contract.

Government Code Section 91013 provides that any person who files a statement after its deadline shall be liable in the amount of $10 per day, up to a maximum of $100, in addition to any administrative penalty (up to the statutory maximum, currently $5,000) imposed by the Fair Political Practices Commission (FPPC). If any of CONSULTANT's employee(s) is required to submit Form 700, and CITY does not receive CONSULTANT's Form 700, then CITY is required to refer this matter to the FPPC or other appropriate enforcement agency.

8. Confidential Information

CONSULTANT shall maintain in confidence and at no time use, except to the extent required to perform its obligations hereunder, any and all proprietary or confidential information of CITY of which CONSULTANT may become aware in the performance of its services.

9. Compliance with Laws

A. CONSULTANT shall not discriminate against, or engage in the harassment of, any City employee or volunteer or any employee of CONSULTANT or applicant for employment because of an individual's race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, veteran or military status, or any other protected characteristic in violation of federal or state law. This prohibition shall apply to all of CONSULTANT's employment practices and to all of CONSULTANT's activities as a provider of services to the City.

B. CONSULTANT shall comply with all federal, state and city laws, statutes, ordinances, rules and regulations and the orders and decrees of any courts or administrative bodies or tribunals in any manner affecting the performance of the Agreement.

10. Independent Contractor

CONSULTANT is acting as an independent contractor in furnishing the services or materials and performing the work required by this Agreement and is not an agent, servant or employee of CITY. Nothing in this Agreement shall be interpreted or construed as creating or establishing the relationship of employer and employee between CITY and CONSULTANT. CONSULTANT is responsible for paying all required state and federal taxes.

11. Hold Harmless/Indemnification

To the fullest extent permitted by law, CONSULTANT shall hold harmless, defend at its own expense, and indemnify the City and its officers, officials, employees, agents, and volunteers, against any and all liability, claims, losses, damages, or expenses, including reasonable attorney's fees, arising from all acts or omissions of CONSULTANT or its officers, agents, or employees in rendering services under this Agreement; excluding, however, such liability, claims, losses, damages, or expenses arising from the City's sole negligence or willful acts. The defense and indemnification obligations of this Agreement are undertaken in addition to, and shall not in any way be limited by, the insurance obligations contained in this Agreement. CONSULTANT's responsibility for such defense and indemnity obligations shall survive the termination or completion of this Agreement.

12. Insurance

The City requires that CONSULTANT maintain insurance requirements on the electronic insurance verification system. CONSULTANT shall procure and maintain, at its own expense, during the life of this Agreement, policies of insurance as specified in Exhibit "C" attached and incorporated herein by reference and shall provide all certificates and endorsements as specified in Exhibit "C" for approval by the City Risk Manager prior to CONSULTANT (or subcontractor) commencing any work under this Agreement.

13. CITY Representative

Dhiren Gandhi, Information Technology Manager, as the City Manager's authorized representative, shall represent CITY in all matters pertaining to the services to be rendered under this Agreement ("CITY representative"). All requirements of CITY pertaining to the services and materials to be rendered under this Agreement shall be coordinated through the CITY representative.

14. CONSULTANT Representative

Eric Talwar, Managing Partner & COO, shall represent CONSULTANT in all matters pertaining to the services and materials to be rendered under this Agreement ("CONSULTANT representative"). All requirements of CONSULTANT pertaining to the services or materials to be rendered under this Agreement shall be coordinated through the CONSULTANT representative.

15. Notices

All notices required by this Agreement, other than invoices for payment which shall be sent directly to Accounts Payable, shall be in writing, and sent by first class with postage prepaid, or sent by commercial courier, to address below.

Nothing in this provision shall be construed to prohibit communication by more expedient means, such as by email, to accomplish timely communication. Each party may change the address by written notice in accordance with this paragraph. Notices delivered personally shall be deemed communicated as of actual receipt; mailed notices shall be deemed communicated as of three business days after mailing.

To CITY: Kathleen Foster, Chief of Information Officer
Information Technology Department
CITY OF SUNNYVALE
P. O. Box 3707
Sunnyvale, CA 94088-3707

To CONSULTANT: Eric Talwar, Managing Principal & COO
Catalyst Consulting Group, Inc.
211 West Wacker Drive, Suite 450
Chicago, IL 60606

16. Assignment

Neither party shall assign or sublet any portion of this Agreement without the prior written consent of the other party.

17. Termination

A. If CONSULTANT defaults in the performance of this Agreement, or materially breaches any of its provisions, CITY at its option may terminate this Agreement by giving written notice to CONSULTANT. In the event of such termination, CONSULTANT shall be compensated in proportion to the percentage of satisfactory services performed or materials furnished (in relation to the total which would have been performed or furnished) through the date of receipt of notification from CITY to terminate. CONSULTANT shall present CITY with any work product completed at that point in time.

B. Without limitation to such rights or remedies as CITY shall otherwise have by law, CITY also shall have the right to terminate this Agreement for any reason upon ten (10) days' written notice to CONSULTANT. In the event of such termination, CONSULTANT shall be compensated in proportion to the percentage of services performed or materials furnished (in relation to the total which would have been performed or furnished) through the date of receipt of notification from CITY to terminate. CONSULTANT shall present CITY with any work product completed at that point in time.

C. If CITY fails to pay CONSULTANT, CONSULTANT at its option may terminate this Agreement if the failure is not remedied by CITY within thirty (30) days after written notification of failure to pay.

18. Entire Agreement; Amendment

This writing constitutes the entire agreement between the parties relating to the services to be performed or materials to be furnished hereunder. No modification of this Agreement shall be effective unless and until such modification is evidenced in writing as an amendment to this

Agreement signed by all parties. If the amendment is signed electronically, the digital signatures must comply with the requirements of California Government Code Section 16.5.

19. Governing Law, Jurisdiction and Venue

This Agreement shall be governed by and construed in accordance with the laws of the State of California, excluding its conflict of law principles. Proper venue for legal actions will be exclusively vested in a state court in the County of Santa Clara. The parties agree that subject matter and personal jurisdiction are proper in state court in the County of Santa Clara, and waive all venue objections.

20. Miscellaneous

Time shall be of the essence in this Agreement. Failure on the part of either party to enforce any provision of this Agreement shall not be construed as a waiver of the right to compel enforcement of such provision or any other provision.

IN WITNESS WHEREOF, the parties have executed this Agreement.

CITY OF SUNNYVALE ("CITY")

By_____________________________
City Manager

ATTEST:

By________________________________
City Clerk

APPROVED AS TO FORM:

By______________________________
City Attorney

CATALYST CONSULTING GROUP, INC. ("CONSULTANT")

By_________________________________

____
Name and Title

By_______________________________

____
Name and Title

Exhibit A
SCOPE OF WORK

SOW Section 1 - Solution Overview

Catalyst's proposed Customer Relationship Management (CRM) system for the City of Sunnyvale (City) is designed to transform constituent engagement, to provide service request management, and enhance overall operational efficiency. We will configure Salesforce Public Sector Solutions with a custom-developed web portal, and a mobile app. The system will be equipped with a comprehensive and user-friendly platform that empowers residents, businesses, the Sunnyvale community, and staff. This solution will enable seamless communication, efficient service delivery, and data-driven decision-making, ultimately leading to improved constituent satisfaction and a more responsive local government.

Agent Service Console – "Sunnyvale Core CRM"

Catalyst will configure an internal service console that will allow agents to engage with constituents, collaborate with colleagues and managers in real-time, share insights, and escalate requests to the right department. The internal service request console will provide a 360-degree view of constituent information through a centralized source, including past interactions, current activities, requests, communications and more. The user-centric design will provide staff with a quick and easy tool to find information and collaborate to address questions and issues in a timely manner.
The Agent Console will fully support phone-to-case (via integration with Cisco telephony) including automatic call logging, screen pops, and click-to-call. This will streamline service request management from callers. The Agent Console will also support email-to-case, providing a basic queue for agents to manage service requests submitted via email. In addition, the Agent Console will also support web-to-case, mobile-to-case, and optional text-to-case if Optional Item 2 Digital Engagement is selected by the City. These intake mechanisms are described in subsequent sections of this SOW.

System Admin Console

The Catalyst solution for the City will have an intuitive System Admin Console. The System Admin Console is internal-facing, which allows administrators to define the standards of the City's Salesforce instance. This out-of-the-box console allows the City's designated administrators to configure the application based on requirements. This is accomplished through a declarative point-and-click framework.

The City is able to appoint one or more administrators who will have access to the Admin Console. They will be able to configure default settings, custom fields, custom reports, role hierarchies, add or manage users, reset passwords, and execute other functions. An administrator with system privileges can manage session timeouts, password policies, IP range login restrictions, delegated authentication/SSO, and other key items. Additionally, the system admin will be able to define access control rules based on constituent type, services or information being sought, and channel type. Admins will also be given the ability to create and manage responses to service requests. Such responses include email templates, creation of messages into an interaction flow for the applicable channels and recording of custom messages associated with a request type. Forced messages can be added by an authorized 311 admin to alert callers or online self-service users of garbage removal efforts, tax time, registration days or other events.

The System Admin Console will also provide the capability for an authorized administrator to set and change business rules associated with requests. This may include the threshold for the number of interactions that can be queued to an agent for each intake channel.

Service Request Types

Catalyst will collaborate with the City to establish a list of 50 – 75 mutually agreed-upon types of service requests that will then be configured in the system. If there are more than 75 service request types, the Catalyst team will present a monetary Change Request to the Sunnyvale team for a mutually-agreed upon move-forward discussion. The following services request types are typically seen in similar CRM for 311 solutions. Please note, the following examples are only recommendations, and we will work with the City to define the most fitting types during our discovery and assessment.

- Street Lighting Issues: Reports of non-functioning or malfunctioning streetlights.
- Pothole Repair: Requests for fixing potholes on streets and roads.
- Trash Pickup Issues: Complaints about missed or delayed garbage collection.
- Recycling Pickup Issues: Similar to trash pickup, but specifically for recycling.
- Graffiti Removal: Requests for cleaning up graffiti on public property.
- Abandoned Vehicles: Reports of vehicles left unattended for extended periods.
- Overgrown Vegetation: Complaints about properties with excessive weed or grass growth.
- Tree Trimming: Requests for pruning or removing trees obstructing pathways or power lines.
- Sidewalk Repair: Requests to fix cracked or uneven sidewalks.
- Noise Complaints: Reports of excessive noise from various sources.
- Illegal Dumping: Reports of unauthorized disposal of waste.
- Street Cleaning: Requests for cleaning streets and public areas.
- Parking Violations: Complaints about illegal or improper parking.
- Public Restroom Maintenance: Requests for cleaning or maintenance of public restrooms.
- Animal Control: Issues related to stray or loose animals.
- Water Leak Reports: Reports of leaks from water mains or public pipes.
- Traffic Signal Issues: Reports of malfunctioning traffic lights.
- Street Sign Damage: Requests to repair or replace damaged street signs.
- Building Code Violations: Reports of unsafe or non-compliant buildings.

Service Request Creation

A constituent who calls into the City is able to immediately connect to a customer service agent. Via an integration with the City's existing Cisco telephony platform, the agent will see the caller's information displayed on a softphone UI window on the Service Request intake screen. The agent can instantly connect relevant caller information to the request record and continue with request creation. The agent determines the nature of the call and creates a new request/case in the solution. The agent types in a keyword or code to describe the request and selects a predefined type.
When the request type is selected, the relevant knowledge base articles are displayed along the right side of the screen. These will allow the operator to provide case resolution information, answer FAQs, and share other informational documents. These can be sent to the constituent via email through the system interface. We provide more information on the Knowledge Base solution in sections below.

After selecting the request type, the agent is prompted to enter an incident location. The Catalyst team will configure the intake page with an embedded graphical user interface (GUI) map using the Esri GIS tool for geographic mapping and data visualization. Once the operator begins to type the address, auto-suggestions will display. This allows the operator to quickly geo-tag the request. Once the proper address is selected, the map will update to display a "pin" for location. Furthermore, geo-layer information will appear to the right of the map for operators to assist callers with additional information needs. These geo-layers will be available by request once created to assist with user reference, reporting purposes, and assignment workflows.

The next step in the intake process involves "Flex Questions," which appear dynamically based on the service type selected. These configurable questions allow agents to collect the information that is most pertinent to the appropriate service type, in order to help better resolve and complete the request. With the solution's ability to suggest a change in service type based on the answer to a question, requests can be created to more efficiently serve the correct division.

The final step in the request creation is adding the caller contact information. We will configure the intake screen to include the required contacts that need to be captured on the request record. This can be unique to the request type and also can be configured to require or allow anonymous reporting. The captured contact information can be configured to the City's requirements and also configured as the Catalyst team solidifies through our proposed planning and discovery phase.

Once a request is saved, the contact record will run through the configured duplicate system to match with existing contact records or create a new master contact if there is no record to be found. The ultimate contact record will be maintained in the CRM system to provide a 360-degree view of that contact/constituent's interaction and engagement with the City.

As the request information is being captured on a single page, it allows agents to utilize the form as a script. This ensures that all constituents receive the same, standardized experience when contacting the City. At the bottom of the form, agents will be presented with various option buttons such as Save, Save and Create New, and Clone.

To accommodate a potential high volume of calls being placed to the City, these buttons will provide agents quick access to a blank form for the next caller. If the constituent would like to submit more than one request a new form can be accessed, pre-populated with the same caller information. Once the request is submitted, the system will present a unique service request tracking number for the operator to relay to the caller for future reference.

Service Request Duplicate Management Engine

The Catalyst team's vision for the Catalyst solution for the City of Sunnyvale includes a robust and unique duplication management functionality. Enabled by Catalyst's duplicate management accelerator, this feature will help City Divisions more effectively manage field workers' time.

The Catalyst solution for the City will be configured with enhanced duplication identification rules. This duplicate engine is facilitated by the system's integration with GIS and will be available on Salesforce's backend (if a City staff member is completing the intake), as well as on the public-facing submission channels (web and mobile).

Here's how it works. In order to flag potential duplicates during request intake, the solution takes into account the combination of three criteria:

- Service request type code.

- Address of a "new" request and a previously reported one(s).
- The status of the previously reported request, particularly if it is still "open."

If a new service request is submitted with the same code and location as an existing open request, the solution will flag it as a potential duplicate. The submitter can then verify whether their request has already been reported before. If they are confident that it is a unique request, they can proceed with the submission as normal. If they realize the request is a duplicate, they can halt their submission and instead track the progress of the original service request. This even includes receiving notifications on the request's status through the solution's "Explore" functionality. This helps ensure that the original problem is resolved.

All requests can be flagged as duplicates whether they were submitted by the same person, or multiple unique reporters

Contact Management

With the Catalyst solution, internal users and agents will have access to a secure, 360-degree view of contact information, found in a single centralized location. This includes historical interactions, demographic information, and cases associated with a contact. This full contact view is provided by the capability of the system to record, track, manage, and report all account interactions from channels.

This will include the following intake channels: Web Forms/Web Portal, Voice/Phone, Email, Mobile Application, and Catalyst's Intelligent Assistant (Chat). Catalyst team is also presenting Marketing Cloud for marketing automation as an optional item in Appendix A of this SOW and text-to-case as another optional item in Appendix A. The system also provides the ability to link contacts, such as members of the same household, to establish additional context. Access to this information supports the City's efforts to provide personalized and effective communication to constituents.

Also inherent to the solution is the capability for internal users to search and retrieve recorded contact interactions by date and time, they can also be accessed by constituent contact information such as email address, reference number, telephone number, address, agent interactions, and other past information.

This contact management component includes the ability for City staff to flag data associated with a contact. This may include similar or duplicate requests to provide the background information that is often necessary for proper communication with constituents.

In the previous section, we described our robust duplicate management engine for service requests. We also note that this functionality will also carry over to contact management, so that City agents can identify duplicative contacts and merge them into one record based on a defined criterion. For example, duplicate contacts can be identified if last name and email matches. An updated phone number can still be "carried over" into the one singular record upon merging the contacts. This keeps system data lower and avoids the creation of multiple records for the same contact.

Knowledge Base

The Catalyst system will provide a comprehensive and intuitive Knowledge Base that will truly enhance convenience and self-service in the delivery of government services. The Catalyst team can use and refine existing content as our foundation for the transition exclusively into the system's Knowledge base. In the process we will perform a content audit to ensure that all articles are written with accessible language that is free of "government speak." We will also explore options to clarify and consolidate articles.

Both staff and constituents are able to access the Salesforce Knowledge Base. For example, during intake a customer service representative could type in a "pothole" related service request in accordance with a caller request. This would in turn trigger a list of suggested pothole-related Knowledge articles to appear. These help answer any questions that may arise when guiding the constituent through the submission process.

Reports and Dashboards

The system we develop for the City will provide an extensive array of standard and ad-hoc reports and dashboards. This is to ensure that internal performance can be monitored and viewed in a single, customizable user-interface. The potential reports and dashboards generated in our system can serve many functions, but the overarching goals of accessing reports and interpreting data is to ensure high constituent satisfaction, and enable the City to continuously improve its services. The Catalyst team members will create between 1-3 custom dashboards per Department and provide training on report and dashboard creation.

Work Order Management

The Catalyst solution for the City will offer robust work order management capabilities. The system will provide the ability to initiate, fulfill, and manage a request for a service through real-time communication and integration with the City's work order management systems. The solution will send service request details to divisional systems for initiating a work order. Then, the system will receive request details from divisional systems to create a corresponding record in the CRM system. Finally, the Catalyst team will compile system workflows that synchronize the changed or updated information between Salesforce and the divisional Work Order Management Systems. This is to close a request.

Work Order Management Integrations

The Catalyst solution will integrate with the City's required work order management systems: EnerGov, Naviline, and the Maintenance Connection system or an alternative system that is selected prior to integration being built. First, a full architecture diagram of the current state will be technically and functionally vetted. The architecture will guide us as we will work with you to select which systems should be absorbed into the Salesforce system, and which should be made into integration points. From there, the design of the individual integrations will occur.

Catalyst follows best practices for connecting to existing systems:

- The integrations should be two-way, meaning the original system will send messages downstream, and the downstream systems will send updates back upstream based on the work order. The likely scenario is that Salesforce will be upstream, with the other systems downstream.
- The upstream system should have the ability to manually or automatically trigger a request to the downstream system. This allows flexibility for the user to review/update the work order prior to sending it downstream, or auto-sending it downstream.
- Once the upstream system has triggered the request downstream to be addressed, the upstream Work Order will lock and only allow updates to occur in the downstream system. This validates that there are no synching issues, and that the resource is utilizing the correct applications to satisfy the work presented.

Key information should be passed between the systems. The particular data elements and event triggers will be designed based on functional and technical requirements. If the functional and technical requirements vary significantly from the RFP specifications, Catalyst would present a Change Request, with a possible financial proposal modification, for mutual agreement on how to move forward between the City and Catalyst teams.

Mass Entry and Update

Based on our experience with many other CRM projects, we understand that there are scenarios in which a large volume of requests must be closed en masse. These scenarios are often labor-intensive on the staff, as they are tasked not only with resolving the high volume of requests, but also in performing the repetitive data entry functions required of the system to resolve each individual ticket. To facilitate a more streamlined process, our Catalyst solution will include a custom-built functionality that allows appropriately permissioned users to resolve requests in bulk, or to enter and close requests within a single interface. The result is a more efficient interface for City workers and a timelier close-loop communication to the constituents.

Integrations

The Catalyst team understands the importance of seamless integrations in delivering a comprehensive and efficient solution for the City. Our approach to integrations is focused on leveraging best-in-class technologies and industry standards to ensure a smooth flow of data between systems, enhance user experience, and streamline processes.

Our solution for the City will integrate with various systems and platforms, as outlined below. These integrations will enable the City to streamline processes, improve data management, enhance customer experience, and gain valuable insights from service request data.

Integration via Real Time API	Specifications
Microsoft Outlook/M365	Send and receive data
ESRI GIS	Send and receive data
Microsoft Active Directory	Send and receive data
Microsoft OneDrive	Send data
EnerGov by Tyler Technologies	Send and receive data
Naviline by Central Square	Send and receive data
Laserfiche	Send and receive data
Telephony by Cisco	
City Website	Embedded features added to the City’s existing website as a means for case intake.
Mobile application developed by Catalyst	Mobile application built by Catalyst and integrated to the core Salesforce CRM being built for the City.
Maintenance Connection CMMS or newly selected CMMS system	Send and receive data
TBD Recreation Management System	Send and receive data
TBD PRA Management System	Send and receive data

Data Migration

Catalyst will migrate legacy data from Access Sunnyvale. We will consider data migration as its own “swim lane” in the overall implementation plan, with key milestones specific to the migration during the five phases of the implementation, specified in Section 2 of the SOW.

Data to be Migrated	Specifications
Request History	All data from January 1, 2022 to the day before go-live from legacy Access Sunnyvale / Microsoft Dynamics 365
Contacts Data	
Account Data	
Request Notes	
Request Communications	

We understand that some departments may have different data migration needs. During our discovery and requirements gathering, we will work with each department to determine deviations from the data migration specification in the table above. We understand that some departments may not want to migrate data into the new system, and we will include this preference in our overall design blueprint.

Our approach to data migration from the legacy Microsoft Dynamics system into Salesforce is as follows:

1. Discovery and Planning

- **Scope & Kick-off:** Identify all data objects for migration, estimate data volume, and align with stakeholders on project goals and roles.

2. Data Assessment & Cleansing

- **Analysis:** Profile source data to identify quality issues, format discrepancies, and obsolete data.
- **Cleansing:** Develop and execute a strategy for cleaning and standardizing data

3. Data Mapping, Micro-Migration & Mapping Validation

- **Mapping:** Create a detailed document mapping all source fields, values, and transformation rules to their Salesforce targets.
- **Test Record:** Migrate a representative 'Case' record, together with its related records, to a Salesforce sandbox.
- **Validation:** Have business stakeholders review the record to confirm the mapping is correct before proceeding.

4. Environment & Tooling

- **Setup:** Prepare a Salesforce sandbox for testing.
- **Tools:** Select an appropriate migration tool (e.g. Salesforce Data Loader, custom scripts, third-party ETL tool) based on data volume and complexity.

5. Migration Training and Testing

- **Training:** Key users, identified as "Trainers," to be trained prior to Pilot migration, ahead of UAT. Training is detailed in phase 4 section within this document.
- **Pilot Migration:** Migrate a small subset of data to the sandbox for validation by the business team. Refine the process as needed.
- **UAT:** Conduct a full migration to a staging environment for comprehensive User Acceptance Testing (UAT).

6. Production Migration

- **Go-Live:** During a planned maintenance window, perform the final data extract and execute the migration to the production Salesforce org.
- **Validation:** Perform post-migration checks to verify data integrity in production.

7. Post-Migration Support

- **Adoption:** Provide user training and dedicated "hypercare" support immediately following the go-live.
- **Post-Hypercare**: Provide handover to the Sunnyvale team, including documentation of technical specifications, workflows, system configuration, and a full technical walk-thru and training as detailed in phase 6 section of this document.

Website Embedded UI Components for Intake

Catalyst will develop custom user interface (UI) components to enable self-service request intake on the City's existing public website. These components will be developed using React JS and will provide a seamless integration with the existing website, with the City's branding elements. This approach offers the City several key benefits:

- **Seamless Integration:** Custom UI components ensure a consistent and unified user experience, making the request intake process feel like a natural extension of the City's online presence.
- **Tailored to City's Needs:** Catalyst can customize the components to align with the City's specific service request types, workflows, and business processes, optimizing efficiency and effectiveness.
- **City Branding:** Incorporating the City's branding elements into the custom UI components reinforces brand identity and fosters trust and familiarity among constituents.
- **React JS Advantages:** React JS is known for its performance, reusability, and flexibility, enabling the creation of interactive and dynamic user interfaces with modular and maintainable code.
- **Flexibility and Scalability:** Custom components can be easily modified and extended to accommodate the City's evolving needs, ensuring adaptability over time.
- **Cost-Effectiveness:** Leveraging the City's existing website infrastructure and building custom components minimizes the need for additional investments in separate platforms or licenses.

Via the embedded UI components on the City's website, constituents will be able to submit service requests or interact with Catalyst's Intelligent Assistant.

Mobile Application for Intake

Catalyst is proposing a custom-built, constituent-facing mobile application for iOS and Android. This will provide constituents with the option of submitting service requests on-the-go. Our experience with developing mobile 311 apps for municipalities informs us that a well-designed mobile solution can significantly improve government services for constituents by enhancing communication, promoting transparency, streamlining processes, and fostering community engagement.

In today's fast-paced, tech-centric society, people expect instant access to City information and easy navigation to City services. By leveraging a mobile app, City governments can meet these expectations to create a more inclusive and efficient system for all residents.

Catalyst believes that developing a CRM mobile app system requires a strategic approach. One that focuses on your requirements, needs, objectives, and the unique needs of a constituent's individual experience. The solution we develop for the mobile app will be available to download from the Android Store, the Apple Store and on related devices.

Mobile app functionality will include:

- Account creation.
- Submit and track service requests of their own, receiving status updates via email or push notification if opt-in is enabled.
- View service requests other people have submitted, even having the option to "follow" them through status update notifications.
- Submit compliments and complaints.

We emphasize that the mobile app for the City will be more than just a way to request and track services. It will be a way to get around, which is a distinguishing factor of Catalyst's approach to mobile applications integrated to CRM systems. The City has many cultural attractions and natural beauty to explore. The "Near Me" functionality will allow constituents to locate public services like transportation stations, libraries, police stations, and US Post Offices. This will be done using the mobile app in two ways:

- They can turn on location services on their device to find facilities closest to them based on their current location.
- They can type in a specific City zip code to locate a particular public service in that area.

Reporting an issue with pedestrian signal timing or a cracked sidewalk is as simple as tapping a phone screen. This makes the on-the-go convenience of government services "packaged" in a mobile app, and can cause a "ripple effect" that cultivates a safer, more accessible, and more sustainable community. In making government services accessible in this fashion, we believe that a mobile app for the City will encourage constituents to participate in civic responsibilities and take ownership in the upkeep of their communities.

Intelligent Assistant Chatbot

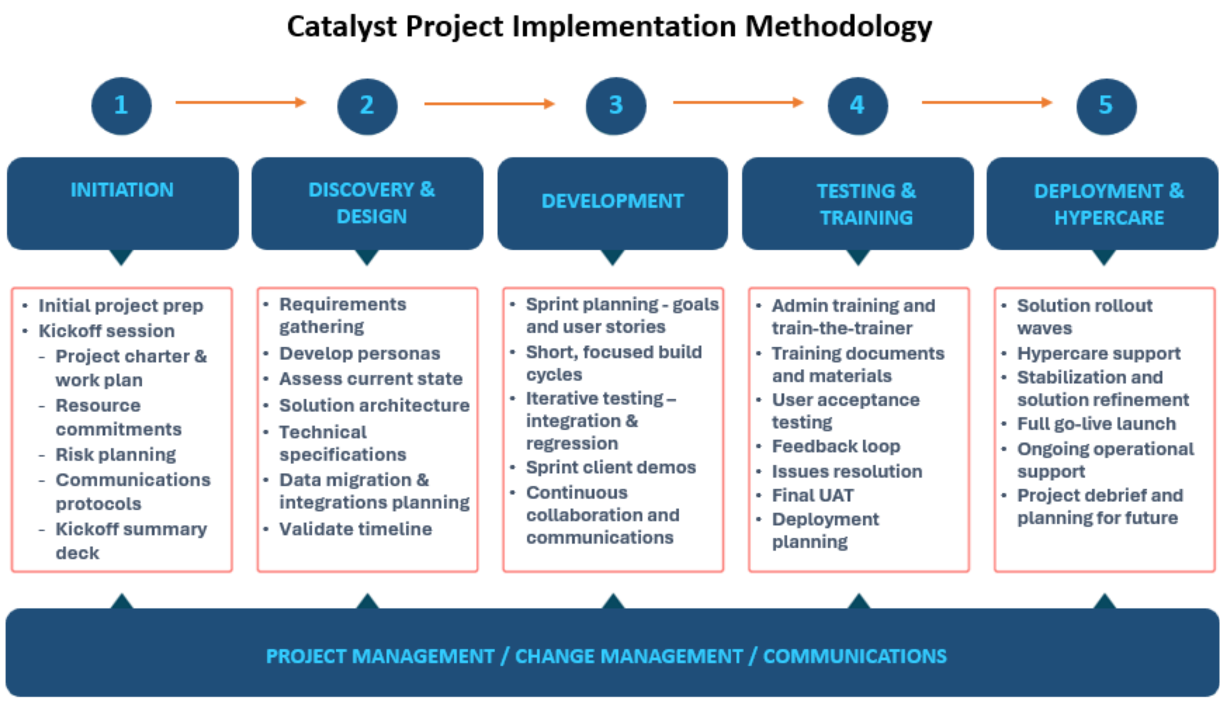
Catalyst proposes an AI-powered Intelligent Assistant to modernize constituent engagement with Sunnyvale's new CRM—especially through enhanced constituent access. The solution delivers a conversational, multilingual, and mobile-first interface that enables residents to easily submit service requests (e.g. potholes, graffiti, broken signage), ask questions and be directed to pertinent Knowledgebase articles, or search for program information. Constituents can use text, voice, or chat on any device—including smartphones—to interact with the Assistant. For instance, while walking or biking, a resident can snap a photo of a pothole and instantly submit it, with the Assistant automatically interpreting the image, categorizing the issue, and triggering a service request.

Built using available large language models (LLMs), natural language processing (NLP), and optional computer vision, the Intelligent Assistant delivers a seamless user experience that reduces the friction of navigating government websites or contacting staff. Internally, Sunnyvale employees can use the same system to quickly access policy documents, procedures, or knowledge articles—improving service speed and consistency.

The Intelligent Assistant will provide the City an accessible, equitable, and user-friendly way to interact with government services. It simplifies and automates the most common public engagement workflows—such as submitting and tracking requests—while providing internal staff with tools to access the right information, at the right time. This reduces call volume, shortens service response times, and enables better coordination across departments. Constituents will benefit from real-time updates, fewer steps to resolution, and an always-available channel for civic interaction.

SOW Section 2 - Implementation Methodology

Catalyst's project management methodology is a comprehensive, phased approach designed to ensure successful project delivery. As shown in the chart below, our approach encompasses five critical phases, integrating robust project management, change management, and communication strategies to ensure seamless execution and stakeholder engagement. This structured framework enables us to deliver tailored solutions that meet the unique needs of the City ensuring a smooth transition from project initiation through to full deployment and support.



Phase 1: Initiation (Approximately 2 Weeks)

The purpose of Project Initiation is to transition from Sales to Delivery, assemble the project team and set the foundation for a successful implementation using internal tools and communication standards. This is the bedrock of our project lifecycle. It's here that we lay the strategic framework, setting clear expectations through collaborative planning. By engaging with key stakeholders, we craft a comprehensive project plan, underpinned by a detailed timeline that sets the pace for the entire project. This phase is critical as it establishes the governance structure and communication cadences that will guide the project's trajectory, ensuring that every team member is synchronized from the onset.

Deliverables:

- Initial project preparation questionnaire sent to City team by Catalyst
- Timeline
- Project dashboard
- Kickoff deck
- Discovery Plan
- Status Report

During the initiation phase, Catalyst will set up the JIRA board and Microsoft Teams repository for project management.

Throughout the following phases, we reference “input” and “output” deliverables. An input deliverable refers to a deliverable from the previous phase which must be completed to start the new phase. An output deliverable is the deliverable that results from completing the activities of a phase.

Phase 2: Discovery and Design (Approximately 16 Weeks)

Here we gather requirements and create the solution design. By creating detailed user personas, we encapsulate the varied user needs, ensuring the solution is user-centric. The current state assessment provides us with a profound understanding of the existing landscape, enabling us to design a future state that is both innovative and practical. The solution architecture emerges from a confluence of requirements gathering and technical acumen, forming a blueprint that is both robust and flexible. This phase is instrumental in crafting a solution that is tailored to the City's needs and also anticipates future growth and technological advancements.

Additionally, during this phase we develop the specific requirements associated with the testing and training plan which will come ahead of the deployment. During this time, Catalyst will work with the City to develop the right training approach, including the design, development, and delivery of the training program. It also includes the responsibility for training materials development and delivery modalities. The training strategy will outline the structure and components of the program.

The strategy will be developed collaboratively with leadership, and include:

- Training needs assessment
- Stakeholder analysis
- Change impact assessment

After we have conducted the training needs assessment, we will be able to define the exact number of training hours and specific courses required. We will provide a report with a detailed analysis of the targeted training participants, the information they need by role, system tasks to learn by role, and the identified training requirements and suggested modalities. The report will also contain recommendations for the design and delivery of the training program based on the findings of the needs assessment.

Finally, data migration specifications will be a topic discussed during the Discovery and Design phase. We will develop the detailed data migration plan to begin during the following Build phase.

The following are in-scope departments to be met for discovery and requirements gathering activities:

- CDD
    - Admin
    - Building
    - Housing (including Homeless Services)
- DPS
    - Admin
    - Alarms and Permits
    - Animal Control
    - Crime Prevention
    - Fire Prevention

  - Neighborhood Preservation
  - Nuisance Vehicles/Vehicle Abatement
  - Police Services
  - Traffic (Safety)
- DPW
  - Admin
  - Parks and Trees
  - Streets
  - Traffic (Engineering)
- ESD
  - Admin
  - Solid Waste and Recycling
  - Water & Sewer
- FIN
  - Admin
  - Purchasing
  - Utility Billing
- ITD
  - CRM Admin
  - ITD Admin
- HRD
  - Admin
- LRS
  - Admin
  - Childcare Resources
  - Class Registration
  - Columbia Neighborhood Center
  - Recreation Services; formerly LCS Community Services
  - Community Theatre and Box Office
  - LIB (Library)
  - Park and Facility Reservations
  - Recreation and Arts
  - Senior Center
- Mayor and Council (OCM)
- NOVA Admin
- OCA Admin
- OCM
  - Admin (includes centralized reporting and user oversight)
  - City Clerk
  - City Manager
  - Communications
  - Downtown
  - Economic Development
  - Equity Access and Inclusion
  - Quarterly Report

Input Deliverables:

- Discovery Plan
- RACI
- RAID Log
- Project KPIs and Goals
- Timeline

Output Deliverables:

- Personas
- Current State Assessment, inclusive of current state process diagrams, tools, responsibilities, automations, and pain points
- Requirements Traceability Matrix
- Solution Design
- System Architecture
- Epic Level Requirements
- Milestone Approval Document
- Testing and Training Plan
- Data Migration Plan
- Integration Design Document (IDD) for each interface

Phase 3: Development (Configuration and Building) (Approximately 12-14 Weeks)

In this key phase we begin building the solution, transforming the design into a working system. Our sprint-based development process allows for continuous integration and feedback, a dynamic that ensures solutions evolve in lockstep with the City's vision and emerging needs. This iterative process, punctuated by regular client demos, invites stakeholder input, reinforcing our commitment to transparency and collaboration. By maintaining constant communication, we ensure that the development is not only technically sound but also aligned with the strategic objectives, optimizing the solution for both immediate impact and long-term sustainability.

We will configure and tailor the core Salesforce CRM to meet the requirements compiled during the Discovery and Design. We will also complete the build of the integrations to the required third-party systems.

We will also complete activities associated with the legacy data migration. Our data migrations are performed through a flexible and optimized approach, adapting our methodology and tooling to the specific requirements of each project.

The City team members will have opportunities to test and provide feedback on the build items during the development sprints throughout this phase.

Input Deliverables:

- Design Documentation
- Epic-Level Requirements
- Personas
- Timeline

Output Deliverables:

- Jira Epics, Tasks, and User Stories
- Completed Sprints and Testable Code
- Sprint Review Presentation
- Sprint Review Notes and Sprint UAT Handoff
- Sprint Planning Presentation
- Deployment Document
- Custom Components Documentation
- System Configuration Changes
- Release Notes

Catalyst will manage deployments and pushes to various environments via our standard methodology which uses the Copado DevOps tool.

Phase 4: Testing and Training (Approximately 4-6 Weeks)

This is the phase where the solution is rigorously evaluated and refined. User training is crafted to empower the City's workforce, enabling a seamless transition to the new systems and processes. User acceptance testing is not just a checkpoint but a continual feedback loop, ensuring that the solution not only meets but exceeds user expectations. This phase is crucial in fostering user confidence and ensuring that the solution is embraced at all levels of the City's operations.

Input Deliverables:

- Verification of formal acceptance of requirements by stakeholders
- Verification of formal acceptance of discovery plan by stakeholders
- Completed all development sprints with UAT Feedback from City
- Training Plan

Output Deliverables:

- Testing Scripts for the City Testers, created by Catalyst with feedback and approval from a designated City team member
- Testing Scripts Feedback from City
- Testing Plan
- User Acceptance Testing Sign Off
- Training Documentation and Training Guides, created by Catalyst with feedback and approval from a City team member, as specified below.
    - Role-Based User Guides: Comprehensive documentation tailored to each user role
    - Quick Reference Guides: 1-2 page summaries of key tasks and processes
    - Video Tutorials: Short demonstrations of common system procedures
    - Interactive Exercises: Hands-on practice scenarios with guided instructions
    - Knowledge Base: Searchable repository of system information and procedures
    - Training Environment: Fully configured training instance with sample data

-
- Completed Training Sessions, as fully identified during the project planning discovery activities, including the following:
    - 1. System Administrators/IT Users: 3-5 days of comprehensive training, followed by 3-5 advanced sessions
    - 2. Super Users/Department Leads: 2-3 days of role-specific training
    - 3. End Users: 1-2 days of role-based training focused on daily workflows
    - 4. Refresher Sessions: 2-hour sessions offered biweekly during the first month post-go-live
- Initial data migration training will be provided to (SME or Functional Leads) with details to properly test pilot migration data. The full data migration will be tested during UAT.
- Initial Technical and Administrator training to be conducted prior to the pilot migration data to test migrated data with the configuration settings.
    - Additional Technical turnover will be conducted and is documented in Phase 6 section of this document.
- Verification of Formal Acceptance of Testing Complete
- Deployment Readiness Signoff
- UAT Execution Report, including details of City team members who completed the testing and their results.

Phase 5: Deployment and Hypercare/Stabilization (90 Days)

Our deployment approach is executed in controlled waves, a deliberate approach that allows for precise management of the transition. Hypercare support ensures that any post-deployment challenges are swiftly addressed, maintaining operational continuity. This phase embodies our commitment to a partnership beyond the initial rollout, with ongoing support and strategic planning for future needs, ensuring that the client continues to thrive on a robust and scalable technological foundation.

Input Deliverables

- Deployment Readiness Signoff
- Testing Scripts
- Training Documentation
- Testing Execution results

Output Deliverables

- Deployment Plan
- Deployment Documentation and final artifacts
    - System diagram
    - Data flow diagram
    - Data mapping
    - Any source code and documentation for core salesforce, and mobile application if applicable

- Integration documentation and mapping.

- Escalation and Rollback Plan
- Post Project Review Meeting

Phase 6: Handover to Sunnyvale Team

In preparation for the completion of the 90-day stabilization period, Catalyst will provide a "Handover" to the Sunnyvale team. The transition of ownership of the build from our team to the Sunnyvale ongoing support team starts during the build. We encourage the team who will be supporting the build on an ongoing basis to participate in review and testing of the platform, ask questions and understand the business requirements that drive the architecture. Once the build is complete, training begins and is inclusive of administrator training. We also suggest those responsible for future support participate in the business user training. During the stabilization, a full transition from our team to the ongoing support IT Team includes passing over any org access including the core Salesforce CRM, mobile application, and third-party integrations; delivery of how to guides, training materials, documentation of the build and integration architecture; and enablement for custom-built feature maintenance. The Catalyst team will schedule a "final walkthrough" of the system to complete the Handover Phase, approximately 90 days after deployment.

Foundational Elements (Throughout the Implementation)

Beneath these phases lies the bedrock of our foundational elements: Project Management, Change Management, and Communication. These principles are interwoven throughout each phase, creating a cohesive fabric that supports the project's structure. Project Management provides the discipline and framework required to execute the project effectively. Change Management is critical in preparing, supporting, and helping individuals and organizations in making organizational change. Communication acts as the lifeblood of the project, ensuring information flows freely and efficiently, keeping all parties aligned and informed.

RACI Diagram

Please see Appendix B of our Statement of Work.

Onsite Trip Recommendations

Two key on-site visits are planned for the core Catalyst project team: one week to begin the discovery phase and one for team training. The discovery visit will allow both teams to collaborate on understanding current state processes and pain points as well as give teams an opportunity to see processes in action. The training visit will bring the project to a smooth landing as teams can collaborate on any final system understanding and prepare teams to use the new CRM in their daily responsibilities with training sessions and learning opportunities. The expectations of both trips are listed below but may change based on the needs of the project and City team members' availability. Additional trips may also be scheduled on an as needed basis.

- The discovery trip may include 5-6 Catalyst resources and will occur Monday through Friday of the week of travel.
- The training trip may include 5-6 Catalyst resources and will occur Monday through Friday of the week of travel.

SOW Section 3 - Project Management Approach

The City's CRM modernization initiative demands careful project management, which Catalyst delivers through our tested methodologies. Catalyst is adept at managing complex technology projects using best practices, including defining a clear scope and translating it into a robust project workplan with the required Work Breakdown Structure (WBS) level. We employ Microsoft Project for overall project management and maintain detailed workplans that include resource estimates, percent complete capability, and other key aspects.

Communication Planning and Management

To successfully deliver the City's CRM we will employ various strategies to ensure effective communication throughout the project lifecycle.

Setting the Stage: The business process analysis and reengineering phase commences immediately after the project kickoff meeting. This phase allows the Catalyst team and the client to establish and agree upon a clear vision of the application's required functionality. The outputs of this phase serve as a roadmap for future project phases and act as a "common language" among all workstreams.

Ongoing Communications: Catalyst recommends facilitating regular meetings throughout the project, including Executive Committee Meetings (quarterly), Steering Committee Status Meetings (monthly), Subject Matter Expert Meetings (weekly), and Catalyst Team Status Meetings (daily). The cadence, methods, and roles of participants are subject to change based on the client's unique needs and preferences.

Demonstrations and Testing: At the completion of each sprint, the client and Catalyst team gather to review the solution built during the sprint. This provides an opportunity for client stakeholders to share feedback on how effectively the solution meets their needs. Additionally, our testing methodology ensures multiple levels of review, starting with engineering staff, continuing with supervisorial staff, and concluding with managerial staff.

Communication Strategy: Catalyst's communication plan encompasses various tools and strategies to facilitate clear, consistent, and timely communication, including:

- Project Kickoff Meeting
- Weekly Status Meetings
- Daily Stand-ups
- Monthly Steering Committee Meetings
- Monthly Progress Reports
- Ad-hoc Meetings

Communication and Collaboration Tools: Catalyst utilizes industry-leading tools to ensure seamless communication, efficient project management, and real-time collaboration among all stakeholders.

Our tools include:

- Project Management Platform: Microsoft Project
- Communication and Collaboration: Microsoft Teams

- Document Management: SharePoint
- Issue Tracking: Jira

Risk and Issues Management

Catalyst distinguishes between "risks" (future-facing, potential impact on the project) and "issues" (present-facing, currently deterring project progress). Our team assumes a "prevention is better than a cure" mentality, identifying potential risks during the Discovery and Solution Visioning phase. We employ strategies to manage risk, including a communication strategy, end-user involvement in sprint deployment, and rigorous testing of migrated data.

If a risk or issue is identified, it is logged with a unique ID, description, impact, project delivery phase, status, responsible party, and mitigation steps. Risks and issues that cannot be effectively mitigated are escalated to the client stakeholders and the Catalyst project manager and delivery executive. An example of a weekly risk management report is shown below.

Salesforce Project Risk Management Report *(example)*

CATALYST CONSULTING GROUP, INC.

Project Sponsor (client)	<name>
Project Manager – (Client)	<name>
Project Manager - Catalyst	<name>

Status Period: <dates>

Overview

Increase transparency and improve the experience WRECR users with implementing new Salesforce system.

Executive Summary

Project is on track for timing and budget. We have outlined a few key issues that need addressed to keep the project on track.

Key Risks & Issues

	Owner	Due
Issue #1: Incomplete Data Migration **Issue Description:** During the preliminary data migration phase, several inconsistencies were found in the existing data records which resulted in incomplete data transfer. **Impact:** This issue could cause delays in subsequent testing and implementation phases, It may also affect the integrity of the final system if not addressed properly. **Action Steps:** The team will thoroughly review all records for inconsistencies, clean the data, and repeat the migration process. Parallelly, a comprehensive data validation strategy will be established to prevent similar issues in the future.	Data migration team	<date>

Key Risks & Issues

	Owner	Due
Issue #2: Integration Challenges with other Current Systems **Issue Description:** The new software package is experiencing minor compatibility issues when attempting to interface with some of the client's legacy systems. **Impact:** This issue could limit the functionalities of the new system, hamper user experience, and delay project timelines if the integration isn't successful. **Action Steps:** The team will work closely with the software vendor to understand the integration requirements and adjust the configuration settings.	Systems integration team	<date>
Issue #3: Resistance to Change Among End Users **Issue Description:** We have identified users in departments who've expressed concern over the transition to the new system, citing a steep learning curve and potential disruption to ongoing operations. **Impact:** This resistance may slow down the project's adoption rate and affect the overall project success. **Action Steps:** The team will initiate focused training programs and provide user-friendly guides to help familiarize the departments with the new system. Also, the benefits of the new system will be communicated effectively to ease the transition.	Change Management Team	<date>

Weekly Risk Management <Client/Project Name>

Scope Management and Change Requests

The process for managing project scope begins during the Project Initiation and Discovery and Visioning Phase with "scope confirmation." The objective is to describe, clearly and in writing, the project scope and accountability for performing tasks. Changes to the agreed-upon scope can be submitted at any time during the project, following a defined Change Control procedure:

1. Change Request Form submission
2. Review and refinement of Change Request
3. Statement of Work (SOW) compilation and review
4. Approval or denial of changes by the client team
5. Implementation of approved changes

Status Reporting

Status reports and meetings provide real-time insights into project progress, enabling stakeholders to monitor milestones, tackle issues, and make informed decisions. They facilitate resource allocation, expectation management, and accountability. An example of a Catalyst project status report is shown below.

Y Salesforce Project Status Report (example)

CATALYST CONSULTING GROUP, INC.

Project Sponsor	<name>
Project Manager - <client>	<name>
Project Manager - Catalyst	<name>

Status Period: April 1-7, 2023

Project Objectives

Increase transparency and improve the experience for client constituents by upgrading and modernizing the town's current system instance and data model structure.

Executive Summary

- Development of sprint 1 continued this week. There will be no demo at the end of this sprint, as this will mainly include org set up, tasks, and planning.
- Continued discussions around case intake and guiding questions with the core team. Priority for next week's core team syncs is to discuss the case intake and case management epics so that work can begin with sprint 2.

Key Accomplishments

- Identified additional initial foundational tasks for sprint 1 and added to the current sprint.
- Reviewed the initial sample guiding questions and the current set up in other similar orgs. Provided an updated template with additional fields for completion of guiding questions and had additional discussions with the core team.
- Corrected 4 failing test classes (SystemLogger, ScheduleBatch, MilestoneUtility, CaseUtility). Failing test classes with the Mitel Managed Package cannot be corrected without changing the package and could cause test issues in the future.
- Began plans and discussions around the setup of the Salesforce sandbox environments and verified plan for setup.
- Verified timeline with <client> team and the anticipated updated go live date of 9/11/23. Will need to finalize specific times in the working deployment document, and an associated communication plan, as the team works in Salesforce after hours.

Key Risks & Issues

	Owner	Due
Additional questions arose around knowledge base and guiding questions, and the teams will discuss again in a future meeting to ensure the appropriate level of support and guidance is provided. Discussions continued this week.	<name>	4/27/23
Mitel failing test classes have potential to cause future issues. This should be discussed on an upcoming core team sync. It is not an immediate concern.	<name>	TBD

Upcoming Milestones

- Sandbox Setup and Refresh – 4/14/23
- Review of cases epics – ~~4/13/23~~ – 4/17/23
- Sample guiding questions prepared – 4/19/23
- Sample knowledge articles prepared, with desired layout – 4/27/23 <name>

Scorecard

Schedule	Scope	Budget	Biz Readiness
Y	Y	Y	Y

High Level Project Schedule & Status

Milestone / Deliverable	Start Date	End Date	Status
Sprint 1 Complete (Foundational Setup & Planning)	4/18/23	4/18/23	In Progress
Sprint 2 Development	4/19/23	5/2/23	To Do
Sprint 2 Demo	5/2/23	5/2/23	To Do

Weekly Project Status Report | FY23

Organizational Change Management

Catalyst's approach to Organizational Change Management (OCM) is designed to foster widespread adoption of the new system across the stakeholder community. Our approach focuses on understanding and preparing for change, leveraging existing behaviors and norms that support the change, developing skills to succeed in the new environment. Change management will be considered an active swimlane throughout the project and begin at the Kickoff meeting.

Change management deliverables include the following:

- Identification of what's changing (processes, roles, systems) as part of our Current State Assessment
- Analyze how these changes will affect different stakeholder groups.
- Develop a communications plan with key messages, channels, timing/cadence, senders, and recipients.
- Communicate the "why" behind the change early and often.
- Deliver targeted training (live sessions, job aids).
- Provide hands-on support leading up to and during hypercare (e.g., office hours).
- Use Discovery to gauge organizational readiness.
- Define KPIs and monitor those post-launch (user log-in patterns, case resolution time)
- Establish a network of change agents,"ambassadors", or answer points within departments.

SOW Section 4 – Cost Proposal

Catalyst One Time Implementation Services

See Exhibit “B” – Compensation Schedule

SOW Section 5 – Requirements Matrix

Please see the original Requirements Matrix submitted with Catalyst's proposal in response to RFP F-25-215.

Appendix A – Optional Items

Item 1: Inclusion of Salesforce Marketing Cloud

Marketing Cloud is a robust communication suite that, at minimum, enables organizations to send brand-compliant, personalized emails and create web forms to capture data. Depending on the edition and licensing tier, customers may also gain access to texting capabilities and/or digital advertising tools. Regardless of your licensing tier, however, Marketing Cloud will be integrated with your Salesforce CRM, allowing you to leverage any CRM data point to trigger or personalize messaging across channels activated for you based on your licensing purchase (email, text, or advertising channels).

Catalyst assumes the following features of Marketing Cloud would be in scope:

- Non-live texting
- Digital advertising
  - Note on Digital Advertising: When we refer to "digital advertising" in the context of Marketing Cloud, it means the platform can create targeted audience segments—including "lookalike audiences"—using your CRM data. However, Marketing Cloud does not create the ad content itself, nor is it used to publish ads directly. Instead, it functions primarily as an audience aggregator that integrates with advertising platforms like Google, Facebook, and LinkedIn.

Catalyst assumes 1 encompassing workspace for "311" is sufficient. If the expectation is for multiple departments to be working within Marketing Cloud for initial rollout, additional "business units" are recommended for procurement.

Catalyst proposes a 7-8 week Marketing Cloud implementation, broken down as follows:

- Weeks 1 and 2: Requirements gathering and design
- Weeks 3 and 4: Build and configuration
- Weeks 5 and 6: Testing and training
- Weeks 7 and 8: Deployment and hypercare

During the main implementation's discovery and design, we will mutually agree to move forward with Marketing Cloud or to forgo including this feature. We will also align on timing for delivery if Marketing Cloud is mutually agreed upon between the City and Catalyst. We could complete the implementation of Marketing Cloud concurrently with the CRM build; during the 90-day warranty; or at a later time.

Appendix B – RACI Diagram

Please see this included below.

Overview

This document outlines the roles and responsibilities of the City team, based on the provided list of participating departments, and the Catalyst team.

For the Catalyst team, the City has the right to request release of staff assigned on the project and to interview and approve anyone assigned to the project.

RACI Key

		Catalyst Team	City Team
R	**Responsible**	Performs the work to complete the deliverable/task	Contributes to the work to complete the deliverable/task, participates in construction of or review of deliverables
A	**Accountable**	Reviews the work for completion and quality	Reviews the work for completion and quality
C	**Consulted**	Provides input based on their expertise	Provides input based on their expertise, participates in validation of deliverables
I	**Informed**	Provided with high-level updates	Provided with high-level updates

City Participation and Role Key

Role	Responsibilities
Steering Committee	• ITD and OCM team members • Initiate the project and identify key team members • Serve as a point of escalation and ultimate approval • Track and advocate for project success
Project Manager	• Provided by ITD • Collaborate with the CCG PM to activate each phase of the project • Coordinate schedules, timelines and approvals
Functional Lead	• Oversee requirements and CRM implementation for their department or functional area • Identify and coordinate SME participation for their department or functional area • Confirm business requirements for their department or functional area • Provide department and/or functional area approvals • Validate and test the CRM to ensure business needs are met • Participate in system training
Subject Matter Expert (SME)	• Provide detailed knowledge and expertise related to their functional role and related business processes

	• Assist with business process definition and identification of pain points • Validate and test the CRM to ensure business needs are met • Participate in system training
ITD Admin	• Provide technical oversight for integrations and technical architecture • Coordinate internal technical work required to stand up CRM • Support internal systems understanding and provide technical specs for any integrated systems • Represent any existing security protocols • Provide data sets for migration • Participate in testing for any integrated systems
ITD CRM Admin	• Participate in all aspects of the CRM Build in preparation for supporting business users in an ongoing capacity • Validate and test the CRM to ensure functional understanding • Participate in system training
ITD Reporting SME	• Provide an understanding of current department agnostic reporting and future reporting needs • Participate in data mapping and migration discussions • Review created reports and validate reporting requirements • Participate in report training

Initiation

During the Initiation phase, the Catalyst team will begin onboarding and orienting team members in preparation for Discovery. The City team will participate in the kickoff meeting as well as review key project orientation documentation. Both project managers will collaborate to schedule discovery and plan project milestones.

Catalyst RACI

	Internal Kickoff	Project Plan	Kickoff	Discovery Plan
Delivery Executive	R	A	A	I
Project Manager	C	R	R	A
Technical Architect	C	C	C	C
Salesforce Solution Architect	C	C	C	C
Integration Architect	I	I	I	I
Data Architect	I	I	I	I
Business Analyst	C	C	C	R
Software Engineer	I	I	I	I
Developer 1	I	I	I	I
Developer 2	I	I	I	I
Developer 3	I	I	I	I
UX/UI Designer	I	I	I	I
OCM/Trainer	I	I	I	I

City RACI

	Kickoff Meeting	Project Plan	Discovery Plan
Steering Committee (ITD/OCM)	C	A	I
Project Manager (ITD)	R	R	A

	Kickoff Meeting	Project Plan	Discovery Plan
Functional Lead - CDD	C	I	C
Functional Lead - DPS	C	I	C
Functional Lead - DPW	C	I	C
Functional Lead - ESD	C	I	C
Functional Lead - FIN	C	I	C
Functional Lead - HRD	C	I	C
Functional Lead - ITD	C	I	C
Functional Lead - LRS	C	I	C
Functional Lead - NOVA	C	I	C
Functional Lead - OCA	C	I	I
Functional Lead - OCM	C	I	C
Subject Matter Experts – CDD, DPS, DPW, ESD, FIN, HRD, ITD, LRS, NOVA, OCA, OCM	C*	I	I
ITD CRM Admin	C	I	I

	Kickoff Meeting	Project Plan	Discovery Plan
ITD Admin	C	I	I
ITD - Reporting SME	C	I	I

*not all SMEs need to attend the kickoff meeting

Discovery/Design

During the Discovery and Design phases, our teams will collaborate to understand each department's business operations as well as the needs and requirements for the new CRM. The Catalyst team will guide discussions, review materials provided by your team, and complete documentation. The City team functional leads and subject matter experts will guide the Catalyst team through business operations, answer questions related to current state operations and future needs, provide documentation and data points, and review and confirm the Catalyst team's understanding of the current state, pain points and future state proposal. It is key that the City's technical stakeholders also participate during discovery/design.

Catalyst RACI

	Personas	Current State Assessment	Requirements Traceability Matrix	Solution Design	System Architecture	Epics Level Requirements	Testing Plan	Training Plan	Data Migration Plan	Milestone Approvals
Delivery Executive	I	I	I	I	I	I	I	I	I	R
Project Manager	A	A	A	A	A	A	A	A	A	A
Technical Architect	I	I	I	A	A	A	C	I	A	I
Salesforce Solution Architect	C	C	C	R	R	R	C	C	C	I
Integration Architect	I	I	I	C	C	C	C	I	C	I

	Personas	Current State Assessment	Requirements Traceability Matrix	Solution Design	System Architecture	Epics Level Requirements	Testing Plan	Training Plan	Data Migration Plan	Milestone Approvals
Data Architect	I	I	I	C	C	C	C	I	R	I
Business Analyst	R	R	R	C	C	R	R	R	C	I
Software Engineer	I	I	I	I	I	I	I	I	I	I
Developer 1	I	I	I	I	I	I	I	I	I	I
Developer 2	I	I	I	I	I	I	I	I	I	I
Developer 3	I	I	I	I	I	I	I	I	I	I
UX/UI Designer	I	I	I	I	I	I	I	I	I	I
OCM/Trainer	C	I	I	I	I	I	I	R	I	I

City RACI

	Personas	Current State Assessment	Requirements Traceability Matrix	Solution Design	System Architecture	Epics Level Requirements	Testing Plan	Training Plan	Data Migration Plan	Milestone Approvals
Steering Committe	I	I	A	A	I	I	I	I	I	R

	Personas	**Current State Assessment**	**Requirements Traceability Matrix**	**Solution Design**	**System Architecture**	**Epics Level Requirements**	**Testing Plan**	**Training Plan**	**Data Migration Plan**	**Milestone Approvals**
e (ITD/OCM)										
Project Manager (ITD)	A	A	R	A	A	A	A	A	A	A
Functional Lead - CDD	R	R	I	C	I	C	I	C	C	I
Functional Lead - DPS	R	R	I	C	I	C	I	C	C	I
Functional Lead - DPW	R	R	I	C	I	C	I	C	C	I
Functional Lead - ESD	R	R	I	C	I	C	I	C	C	I
Functional Lead - FIN	R	R	I	C	I	C	I	C	C	I
Functional Lead - HRD	R	R	I	C	I	C	I	C	C	I
Functional Lead - ITD	R	R	I	C	I	C	I	C	C	I
Functional Lead - LRS	R	R	I	C	I	C	I	C	C	I

	Personas	Current State Assessment	Requirements Traceability Matrix	Solution Design	System Architecture	Epics Level Requirements	Testing Plan	Training Plan	Data Migration Plan	Milestone Approvals
Functional Lead - NOVA	R	R	I	C	I	C	I	C	C	I
Functional Lead - OCA	R	R	I	C	I	C	I	C	C	I
Functional Lead - OCM	R	R	I	C	I	C	I	C	C	I
Subject Matter Experts – CDD, DPS, DPW, ESD, FIN, HRD, ITD, LRS, NOVA, OCA, OCM	C	C	I	C	I	C	I	I	I	I
ITD CRM Admin	I	I	I	R	R	I	C	C	C	I
ITD Admin	I	I	I	R	R	I	C	I	C	I
ITD - Reporting SME	I	I	I	C	I	I	I	I	R	I

Development

During development, the Catalyst team will take on the majority of the effort, standing up the functionality determined in the discovery phase. The City team functional leads and select subject matter experts will also be asked to participate in system demos, review elements of the build, and test out functionality. The CRM Admin should plan to participate as well. Any data loading and integrations will be reviewed and tested in coordination between the City and Catalyst teams.

Catalyst RACI

	User Stories, Jira Config	Build Work	Sprint Documentation	Sprint Testing	Milestone Approvals
Delivery Executive	I	I	I	I	R
Project Manager	A	I	R	A	A
Technical Architect	A	A	C	R	I
Salesforce Solution Architect	A	A	C	R	I
Integration Architect	R	R	C	C	I
Data Architect	R	R	C	C	I
Business Analyst	R	C	C	R	I
Software Engineer	C	R	C	C	I
Developer 1	C	R	C	C	I
Developer 2	C	R	C	C	I
Developer 3	C	R	C	C	I

	User Stories, Jira Config	Build Work	Sprint Documentation	Sprint Testing	Milestone Approvals
UX/UI Designer	C	C	I	I	I
OCM/Trainer	I	I	I	I	I

City RACI

	User Stories, Jira Config	Build Work	Sprint Documentation	Sprint Testing	Milestone Approvals
Steering Committee (ITD/OCM)	I	I	I	I	R
Project Manager (ITD)	A	A	A	A	A
Functional Lead - CDD	C	I	C	R	I
Functional Lead - DPS	C	I	C	R	I
Functional Lead - DPW	C	I	C	R	I
Functional Lead - ESD	C	I	C	R	I
Functional Lead - FIN	C	I	C	R	I
Functional Lead - HRD	C	I	C	R	I
Functional Lead - ITD	C	I	C	R	I

	User Stories, Jira Config	Build Work	Sprint Documentation	Sprint Testing	Milestone Approvals
Functional Lead - LRS	C	I	C	R	I
Functional Lead - NOVA	C	I	C	R	I
Functional Lead - OCA	C	I	C	R	I
Functional Lead - OCM	C	I	C	R	I
Subject Matter Experts – CDD, DPS, DPW, ESD, FIN, HRD, ITD, LRS, NOVA, OCA, OCM	I	I	I	R*	I
ITD CRM Admin	I	I	C	R	I
ITD Admin	I	I	C	C	I
ITD - Reporting SME	I	I	C	R*	I

*not all SMEs need to participate in testing

Testing/Training

Following the completion of the initial build, the Catalyst team will complete end-to-end testing before passing over to the City team to complete User Acceptance Testing. Any feedback from the City will be reviewed, validated, prioritized and remediated by the Catalyst team in preparation for the deployment phase. The Catalyst team will begin preparations for training by creating materials for trainees and trainers. Materials will be reviewed by key members of the City team to confirm understanding of business processes.

Catalyst RACI

	E2E Testing	**Test Scripts**	**UAT**	**Training Curric.**	**How To Guides**	**Trainer, Session Materials**	**Training Sessions**	**Milestone Approvals**
Delivery Executive	I	I	I	I	I	I	I	R
Project Manager	A	A	A	A	A	A	A	A
Technical Architect	C	C	C	I	I	I	I	I
Salesforce Solution Architect	R	C	R	C	C	C	C	I
Integration Architect	C	I	I	I	I	I	I	I

	E2E Testing	Test Scripts	UAT	Training Curric.	How To Guides	Trainer, Session Materials	Training Sessions	Milestone Approvals
Data Architect	C	I	I	I	I	I	I	I
Business Analyst	R	R	R	R	R	R	R	I
Software Engineer	C	I	C	I	I	I	I	I
Developer 1	C	I	C	I	I	I	I	I
Developer 2	C	I	C	I	I	I	I	I
Developer 3	C	I	C	I	I	I	I	I
UX/UI Designer	C	I	C	I	I	I	I	I
OCM/Trainer	R	I	I	R	R	R	R	I

City RACI

	E2E Testing	Test Scripts	UAT	Training Curric.	How To Guides	Trainer, Session Materials	Training Sessions	Milestone Approvals
Steering Committee (ITD/OCM)	I	I	I	I	I	I	I	R
Project Manager (ITD)	I	I	A	A	A	A	A	A
Functional Lead - CDD	I	I	R	C	C	C	R	I
Functional Lead - DPS	I	I	R	C	C	C	R	I
Functional Lead - DPW	I	I	R	C	C	C	R	I
Functional Lead - ESD	I	I	R	C	C	C	R	I
Functional Lead - FIN	I	I	R	C	C	C	R	I
Functional Lead - HRD	I	I	R	C	C	C	R	I

	E2E Testing	Test Scripts	UAT	Training Curric.	How To Guides	Trainer, Session Materials	Training Sessions	Milestone Approvals
Functional Lead - ITD	I	I	R	C	C	C	R	I
Functional Lead - LRS	I	I	R	C	C	C	R	I
Functional Lead - NOVA	I	I	R	C	C	C	R	I
Functional Lead - OCA	I	I	R	C	C	C	R	I
Functional Lead - OCM	I	I	R	C	C	C	R	I
Subject Matter Experts – CDD, DPS, DPW, ESD, FIN, HRD, ITD LRS, NOVA,	I	I	R*	I	I	I	R	I

	E2E Testing	Test Scripts	UAT	Training Curric.	How To Guides	Trainer, Session Materials	Training Sessions	Milestone Approvals
OCA, OCM								
ITD CRM Admin	I	I	R	C	C	C	R	I
ITD Admin	I	I	C	I	I	I	R	I
ITD - Reporting SME	I	I	R*	I	I	I	I	I

*not all SMEs need to participate in testing

Deployment

Deployment of key CRM functionality will be completed by the Catalyst team with support from the City technical team for integrated systems. Production validation will be completed by both teams.

Catalyst RACI

	Deployment Plan	Deployment Readiness	Deployment Documentation	Post Mortem	Milestone Approvals
Delivery Executive	I	I	I	A	R
Project Manager	A	A	A	R	A
Technical Architect	A	A	R	I	I

	Deployment Plan	Deployment Readiness	Deployment Documentation	Post Mortem	Milestone Approvals
Salesforce Solution Architect	R	R	R	I	I
Integration Architect	R	R	R	I	I
Data Architect	R	R	R	I	I
Business Analyst	C	C	C	I	I
Software Engineer	I	I	I	I	I
Developer 1	C	R	C	I	I
Developer 2	I	I	I	I	I
Developer 3	I	I	I	I	I
UX/UI Designer	I	I	I	I	I
OCM/Trainer	I	I	I	I	I

City RACI

	Deploy. Plan	Deploy. Readiness	Deployment Documentation	Post Mortem	Milestone Approvals
Steering Committee (ITD/OCM)	I	I	I	A	R

	Deploy. Plan	Deploy. Readiness	Deployment Documentation	Post Mortem	Milestone Approvals
Project Manager (ITD)	A	I	A	R	A
Functional Lead - CDD	C	I	I	R	I
Functional Lead - DPS	C	I	I	R	I
Functional Lead - DPW	C	I	I	R	I
Functional Lead - ESD	C	I	I	R	I
Functional Lead - FIN	C	I	I	R	I
Functional Lead - HRD	C	I	I	R	I
Functional Lead - ITD	C	I	I	R	I
Functional Lead - LRS	C	I	I	R	I
Functional Lead - NOVA	C	I	I	R	I
Functional Lead - OCA	C	I	I	R	I
Functional Lead - OCM	C	I	I	R	I
Subject Matter	I	I	I	R*	I

	Deploy. Plan	Deploy. Readiness	Deployment Documentation	Post Mortem	Milestone Approvals
Experts – CDD, DPW, DPW, ESD, FIN, HRD, ITD, LRS, NOVA, OCA, OCM					
ITD CRM Admin	A	C	A	R	I
ITD Admin	C	I	C	R	I
ITD - Reporting SME	C	I	C	R*	I

*not all SMEs need to participate in the post mortem

City Staffing Commitment Estimates

	Initiation		Discovery/Design								
Week	1	2	3	4	5	6	7	8	9	10	11
				onsite							
Steering Committee (ITD/OCM)	2	2	2	20	2	2	2	2	2	2	2
Project Manager (ITD)	10	10	10	40	10	10	10	10	10	10	10
Functional Lead - CDD	2	2	4	20	8	2	2	2	2	2	4
Functional Lead - DPS	2	2	4	20	8	8	8	2	2	2	4

	Initiation		Discovery/Design								
Functional Lead - DPW	2	2	4	20	2	8	8	2	2	2	4
Functional Lead - ESD	2	2	4	20	2	2	8	2	2	2	4
Functional Lead - FIN	2	2	4	20	2	2	2	8	2	2	4
Functional Lead - HRD	2	2	4	20	2	2	2	8	2	2	4
Functional Lead - ITD	2	2	4	20	2	2	2	8	2	2	4
Functional Lead - LRS	2	2	4	20	2	2	2	2	8	2	4
Functional Lead - NOVA	2	2	4	20	2	2	2	8	2	2	4
Functional Lead - OCA	2	2	4	20	2	2	2	2	8	2	4
Functional Lead - OCM	2	2	4	20	2	2	2	8	2	2	4
Subject Matter Experts - CDD	2	2	4	20	8	2	2	2	2	2	4
Subject Matter Experts - DPS	2	2	4	20	8	8	8	2	2	2	4
Subject Matter Experts - DPW	2	2	4	20	2	8	8	2	2	2	4
Subject Matter Experts - ESD	2	2	4	20	2	2	8	2	2	2	4
Subject Matter Experts - FIN	2	2	4	20	2	2	2	8	2	2	4
Subject Matter	2	2	4	20	2	2	2	8	2	2	4

	Initiation		Discovery/Design								
Experts - HRD											
Subject Matter Experts - ITD	2	2	4	20	2	2	2	2	8	2	4
Subject Matter Experts - LRS	2	2	4	20	2	2	2	2	8	2	4
Subject Matter Experts - NOVA	2	2	4	20	2	2	2	2	8	2	4
Subject Matter Experts - OCA	2	2	4	20	2	2	2	2	8	2	4
Subject Matter Experts - OCM	2	2	4	20	2	2	2	2	8	2	4
ITD CRM Admin	4	4	4	20	4	4	4	4	4	2	4
ITD Admin	2	2	4	20	4	4	4	4	4	2	4
ITD - Reporting SME	2	2	4	4	2	2	2	2	8	2	4

	Discovery/Design									**Development**	
Week	12	13	14	15	16	17	18	19	20	21	22
	deliverables						deliverables				
Steering Committee (ITD/OCM)	4	2	2	2	2	2	4	2	2	2	2
Project Manager (ITD)	16	10	10	10	10	10	16	10	10	10	20
Functional Lead - CDD	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - DPS	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - DPW	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - ESD	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - FIN	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - HRD	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - ITD	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - LRS	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - NOVA	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - OCA	12	4	2	2	2	4	12	4	4	2	4
Functional Lead - OCM	12	4	2	2	2	4	12	4	4	2	4
Subject Matter Experts - CDD	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - DPS	8	2	2	2	2	2	8	4	4	2	8

	Discovery/Design									Development	
Subject Matter Experts - DPW	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - ESD	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - FIN	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - HRD	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - ITD	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - LRS	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - NOVA	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - OCA	8	2	2	2	2	2	8	4	4	2	8
Subject Matter Experts - OCM	8	2	2	2	2	2	8	4	4	2	8
ITD CRM Admin	16	4	2	2	2	4	16	4	4	2	8
ITD Admin	12	4	2	2	2	4	12	4	4	2	4

	Discovery/Design									Development	
ITD - Reporting SME	8	2	2	2	2	2	8	4	4	2	2

	Development										Testing / Training
Week	23	24	25	26	27	28	29	30	31	32	33
Steering Committee (ITD/OCM)	2	2	2	2	2	2	2	2	2	2	2
Project Manager (ITD(	10	20	10	20	10	20	10	20	10	20	20
Functional Lead - CDD	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - DPS	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - DPW	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - ESD	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - FIN	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - HRD	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - ITD	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - LRS	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - NOVA	2	4	2	4	2	4	2	4	2	4	16
Functional Lead - OCA	2	4	2	4	2	4	2	4	2	4	16

Functional Lead - OCM	2	4	2	4	2	4	2	4	2	4	16
Subject Matter Experts - CDD	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - DPS	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - DPW	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - ESD	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - FIN	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - HRD	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - ITD	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - LRS	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - NOVA	2	8	2	8	2	8	2	8	2	8	16
Subject Matter Experts - OCA	2	8	2	8	2	8	2	8	2	8	16

Subject Matter Experts - OCM	2	8	2	8	2	8	2	8	2	8	16
ITD CRM Admin	2	8	2	8	2	8	2	8	2	8	24
ITD Admin	2	4	2	4	2	4	2	4	2	4	16
ITD - Reporting SME	2	2	2	2	2	2	2	2	2	8	8

Testing/Training				**Deployment**		**Hyper Care**
week	34	35	36	37	38	weeks 39-48
			onsite			
Steering Committee (ITD/OCM)	2	2	20	2	2	0
Project Manager (ITD)	10	20	40	20	10	2
Functional Lead - CDD	8	8	24	8	10	0
Functional Lead - DPS	8	8	24	8	10	0
Functional Lead - DPW	8	8	24	8	10	0
Functional	8	8	24	8	10	0

Testing/Training				Deployment		Hyper Care
Lead - ESD						
Functional Lead - FIN	8	8	24	8	10	0
Functional Lead - HRD	8	8	24	8	10	0
Functional Lead - ITD	8	8	24	8	10	0
Functional Lead - LRS	8	8	24	8	10	0
Functional Lead - NOVA	8	8	24	8	10	0
Functional Lead - OCA	8	8	24	8	10	0
Functional Lead - OCM	8	8	24	8	10	0
Subject Matter Experts - CDD	8	2	24	8	10	0
Subject Matter Experts - DPS	8	2	24	8	10	0
Subject Matter	8	2	24	8	10	0

Testing/Training				Deployment		Hyper Care
Experts - DPW						
Subject Matter Experts - ESD	8	2	24	8	10	0
Subject Matter Experts - FIN	8	2	24	8	10	0
Subject Matter Experts - HRD	8	2	24	8	10	0
Subject Matter Experts - ITD	8	2	24	8	10	0
Subject Matter Experts - LRS	8	2	24	8	10	0
Subject Matter Experts - NOVA	8	2	24	8	10	0
Subject Matter Experts - OCA	8	2	24	8	10	0
Subject Matter Experts - OCM	8	2	24	8	10	0
ITD CRM Admin	8	8	32	24	20	2
ITD Admin	8	8	8	8	40	0

Testing/Training				**Deployment**		**Hyper Care**
ITD - Reporting SME	8	2	16	8	10	0

Exhibit "B"
COMPENSATION SCHEDULE

A. Compensation for Basic Services

Delivery Milestone	Total Payment	10% Retention	Payment at Milestone Signoff* to Catalyst with 10% Retention Subtracted from Total
Initiation	Day after Kickoff Meeting: $9,525.00	$952.50	$8,572.50
Discovery	Discovery Signoff: $93,840.00	$9,384.00	$84,456.00
Design	Design Signoff and Approval to Start Build: $93,840.00	$9,384.00	$84,456.00
Build (Sprints 0, 1, 2)	Completion of Sprint 2 Signoff: $128,043.33	$12,804.33	$115,239.00
Build (Sprints 3, 4)	Completion of Sprint 4 Signoff: $128,043.33	$12,804.33	$115,239.00
Build (Sprints 5, H)	Completion of Sprint H Signoff: $128,043.33	$12,804.33	$115,239.00
Testing and Training	Testing and Training Signoff: $101,600.00	$10,160.00	$91,440.00
Deployment and 90 Days of Hypercare/Stabilization	Completion of Hypercare: $26,010.00	$2,601.00	$23,409.00
Total	$708,945.00	$70,894.50	$638,050.50

*Sign-Off Approvals: Prior to Catalyst submitting an invoice to Sunnyvale Finance, the Catalyst Project Manager will seek approval from the Sunnyvale Project Manager in the form of a "Sign Off Approval Form." This approval form will be presented to the Sunnyvale Project Manager at the appropriate time and be included with the invoice sent to Sunnyvale Finance. Milestone acceptance is contingent on the system functioning properly and meeting mutually-agreed upon performance criteria.

Invoices and Retention: All delivery milestones will be billed on a fixed fee basis as set forth in the table above. Catalyst will submit an invoice with a 10% retention excluded/subtracted for each milestone invoice, with NET 30 payment terms. All retention will be invoiced after a successful and signoff approval of deployment and 90 days of Hypercare/Stabilization, with NET 30 payment terms.

B. Compensation for Optional Services

The following services are optional, at City's discretion, and shall be provided only with prior written authorization of City's project manager. Signoff approvals, invoicing, and retention for approved optional services shall follow the process described in section A of this Exhibit B.

Optional Item	Total Payment	10% Retention	Payment at Milestone Signoff* to Catalyst

			with 10% Retention Subtracted from Total
Marketing Cloud Org Set Up	$50,000 at the completion of Testing and Training, or at another mutually agreed upon time with the City.	$5,000.00	$45,000.00
Digital Engagement Set Up	$15,000 at the completion of Testing and Training, or at another mutually agreed upon time with the City.	$1,500.00	$13,500.00

C. Additional Services

Additional Services shall mean any services that are determined by CITY to be necessary for the proper completion of the Project, but which are not included within the Scope of Required Services and/or Optional Services described in Exhibit "A". The parties may mutually agree in writing to additional services. Catalyst will present detailed written proposals to City in advance of performing any additional service, and shall not perform any additional service without prior written approval from City's project manager. CONSULTANT shall not receive any compensation for Additional Services performed without the prior written authorization of CITY.

Additional services will be billed at the following rates:

- Trainer: $165
- Project Manager: $200
- Developer: $100

Exhibit C
INSURANCE REQUIREMENTS

Consultant shall procure and maintain for the duration of the Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work by the Consultant, their agents, representatives, or employees.

Minimum Scope and Limits of Insurance. Consultant shall maintain limits not less than:

1. **Commercial General Liability**: coverage written on an occurrence basis with limits not less than $1,000,000 per occurrence and $2,000,000 aggregate for bodily injury, personal injury and property damage. ISO Occurrence Form shall be at least as broad as CG 0001.

2. **Automobile Liability**: coverage with a combined single limit of not less than $1,000,000 per occurrence applying to all owned, non-owned, or hired vehicles used in conjunction with this Agreement for bodily injury and property damage. ISO Form shall be at least as broad as CA 0001.

3. **Workers' Compensation:** Statutory Limits and **Employer's Liability**: $1,000,000 per accident for bodily injury or disease.

Industry Specific Coverages. If checked below, the following insurance is also required:

☒ **Professional Liability / Errors and Omissions Liability** coverage with limits not less than $1,000,000 per occurrence or claim.

☒ **Valuable Papers and Electronic Data Processing** with limits not less than $10,000 each.

☒ **Cyber & Tech Liability** coverage with limits not less than of $1,000,000 per occurrence or claim.

☐ **Crime coverage** with limits not less than $500,000 to include third party premises endorsement.

Deductibles, Self-Insured Retentions and Other Coverages:
Any deductibles or self-insured retentions must be declared and reviewed by the City of Sunnyvale, Risk Manager. The Consultant shall guarantee payment of any losses and related investigations, claim administration and defense expenses within the deductible or self-insured retention.

The aforementioned insurance requirements can be met through any combination of self-insured, primary and excess/umbrella policies that fulfill the stipulated coverage as cited above.

Other Insurance Provisions:

1. During the term of the Agreement, the City of Sunnyvale, its officers, officials, employees, agents, and volunteers are to be covered as an additional insured in the Consultant's commercial general liability policy (and if industry specific coverage is checked above, valuable papers, electronic data processing, and cyber liability policies) with respect to liability arising out of activities performed by or on behalf of the Consultant; products and completed operations of the Consultant; premises owned, occupied or used by the Consultant. The coverage shall contain no special limitations on the scope of protection afforded to the City of Sunnyvale, its officers, officials, employees, agents, or volunteers.

Additional Insured Endorsement for ongoing operations at least as broad as ISO CG 20 10 Scheduled, or automatic CG 20 38 and completed operations shall be at least as broad as ISO CG 20 37 scheduled or automatic ISO CG 20 40.

2. During the term of the Agreement, the Consultant's Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City of Sunnyvale.

3. For all Architects, Engineers and Design Professionals - If Industry Specific Coverage box is check above **and** if the Consultant's Professional Liability/Errors and Omissions coverage is written on a claims made basis:
    a. The Retroactive Date must be shown and must be before the date of the Agreement or the beginning of contract work.
    b. Insurance must be maintained and evidence of insurance must be provided *for at least three (3) years after completion of the contract of work.*
    c. If coverage is canceled or non-renewed, and not *replaced with another claims-made policy form with a Retroactive Dat*e prior to the Agreement effective date, the Consultant must purchase "extended reporting" coverage for a minimum of *three (3)* years after completion of contract work.

4. For any claims related to this agreement, the Consultant's insurance shall be primary. Any insurance or self-insurance maintained by the City of Sunnyvale, its officers, officials, employees, agents and volunteers shall be excess of the Consultant's insurance and shall not contribute with it and shall be at least as broad as ISO CG 20 01 04 13.

5. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the City of Sunnyvale, its officers, officials, employees, agents or volunteers.

6. The Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

7. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, cancelled by either party, reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the City of Sunnyvale.

8. Any umbrella or excess Insurance Liability policies shall be true "following form" of the underlying policy coverage, terms, conditions, and provisions and shall meet all of the insurance requirements stated in this document, including the additional insured, SIR, and primary and non-contributory insurance requirements for the benefit of City (if agreed to in a written contract or agreement) until all coverage carried by or available to the Consultant's primary and excess liability policies are exhausted and before the City's own Insurance or self-insurance shall be called upon to contribute to a loss.

9. The policy limits of coverage shall be made available to the full limits of the policy. The minimum limits stated above shall not serve to reduce the Consultant's policy limits of coverage. Therefore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this agreement, or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured, whichever is greater.

<u>Acceptability of Insurers:</u>

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, and who are admitted and authorized to do business and in good standing in California unless otherwise acceptable to the City of Sunnyvale’s Risk Manager.

Verification of Coverage:
City utilizes an electronic insurance verification system to track and verify all insurance related documents. City is no longer accepting insurance documents by mail and will only accept electronic insurance documents. City will email the Consultant requesting proof of insurance for this Agreement through an electronic insurance verification system, which includes instructions on how to upload insurance documents electronically. Consultant shall furnish the City with an electronic Certificate of Insurance effecting the coverage required. The certificates are to be signed by a person authorized by that insurer to bind coverage on its behalf and name City of Sunnyvale, Attn: Risk Management, 456 W. Olive Ave, Sunnyvale, CA 94088 as the certificate holder. All certificates are to be received and approved by the City, Risk Manager prior to commencement of work.

The Consultant shall provide certificate(s) evidencing renewals of all insurance required herein prior to the expiration date of any such insurance. Consultant shall submit insurance certificates, reflecting the policy renewals through the City’s electronic insurance verification system. City reserves the right to require complete, certified copies of all required insurance policies, at any time.

Subcontractors
Consultant shall require all sub-contractors to procure and maintain insurance policies subject to these requirements. Failure of Consultant to verify existence of subcontractor’s insurance shall not relieve Consultant from any claim arising from subcontractors work on behalf of Consultant.