Statement of Work

City of Riverside

Planning and GIS updates

Feburary 02, 2023

This proposal will be valid through January 31, 2023

Table of Contents

Version	Notes	Author	Date
1.0	Initial Draft	Ken Hogan	05/20/2022
2.0	Final	Ken Hogan	07/21/2022
2.1	Final draft with updates	Ken Hogan	10/28/22
2.2	Final updates with requirement priorities included	Chris Stolte	11/8/2022
2.3	Final pricing	Ken Hogan	12/20/2022
3.0	Minor changes to wording – Ken and Steve	Ken Hogan	01/06/2023
3.1	Minor updates	Ken Hogan	01/11/2023
4.0	Minor pricing update	Ken Hogan	02/02/2023

Section 1.0 General Statement and Agreement

This Statement of Work (hereinafter called "SOW") is issued pursuant to the Computronix Master Services Agreement (the "Agreement") between the City of Riverside ("City") and Computronix (U.S.A.) Inc. ("Computronix"). This SOW is subject to the terms and conditions contained in the Agreement between the parties and is made a part thereof. Any term not otherwise defined herein shall have the meaning specified in the Agreement. In the event of any conflict or inconsistency between the terms of this SOW and the terms of this Agreement, the terms of the Agreement shall govern and prevail.

This SOW is entered into by and between Computronix and the City, and is subject to the terms and conditions specified below. The Exhibit(s) to this SOW, if any, shall be deemed to be a part hereof. In the event of any inconsistencies between the terms of the body of this SOW and the terms of the Exhibit(s) hereto, the terms of the body of this SOW shall prevail.

Period of Performance

The Services shall commence upon execution of this SOW and is planned for up to a 9 month project duration. This timeline will be finalized throughout the project as the requirements and design are defined, validated and incorporated into the scope of the project.

Validity, Currency and Shipping

The provided prices and quotation details are subject to change if the City does not provide response on or before January 31, 2023. The City will provide a signed copy of the Statement of Work. All quoted prices are in US dollars.

Section 2.0 Computronix Contact Information

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Section 3.0 Background

Project Overview

The City of Riverside implemented the POSSE LMS Planning module, using the Out of the Box work-flows. The staff have had a chance to use the software and have some requests to streamline the workflows to increase staff efficiencies. Ultimately, the goal is to streamline the Housing Elements related to POSSE workflows and electronic document submission functionality.

This project's objectives are listed from the LEAP and SB2 Grant Funds – e-Plan submission and are distilled in the following 4 points:

1. The LEAP and SB2 grant funding would be used to update the City Planning Division ePlan submission capabilities to expedite and streamline the entitlement process. Using the City's current permitting software (POSSE), workflows would be reviewed and modified if necessary, for Planning Entitlements including Conditional Use Permits, Minor Conditional Use Permits, Variances, Design Review, General Plan Amendments, Rezoning, Specific Plan Amendment, etc. to allow applicants to submit plans and payment on-line to help streamline the process.
2. Additional funding was secured to integrate planning data into a GIS Dashboard. This work would best be done together as they are dependent. However, the work should be invoiced separately, as the grants are different.
3. Tasks to be completed include evaluate current workflows, identify barriers to expedited review process, establish more streamlined process, develop the software, test the software and launch to the public.
4. Implementation would be by Planning staff once the project goes through User Acceptance Training and public launching of the electronic document submission via the Customer portal.

e-Plan submission is defined as the ability of the applicant to attach and submit plans electronically.

Assumptions

1. The City of Riverside is responsible for confirming the project deliverables meet the LEAP and SB2 Grant requirements and justifying the grant dollar usage and value.
2. The work done for the GIS work will be tracked and billed separately from the Planning workflow enhancements.
3. Workflow status changes will be heavily scrutinized, as changes to the workflow status could affect existing jobs and become more costly.
4. A visible leader will support these changes and drive staff system and process changes.
   o Organizational Change Management will be addressed by the City.
5. The specific scope of the project has been defined and prioritized by the City through joint working sessions with Computronix who has provided high-level estimates. Further refining of the estimates will occur during the design phase of this project and some adjusting of scope may be necessary (although not expected) as more detailed work on each scope item is completed.

Section 4.0 Project Scope

Overview of Scope and Project Approach

Scope of Enhancement to the existing Planning module

• The Computronix team will work with the Riverside team to improve the speed of the housing approvals.

Scope of Enhancement to the Riverside POSSE/GIS Interface

• The goal is to provide required Planning related data (stored in POSSE) through an interface from POSSE to the Riverside GIS system. It is expected that the Riverside team will work with the Computronix team to build out the interface. Once the interface is functioning, the Riverside team will build a public facing dashboard.

See Section 9 for the list of High-Level Requirements

Project Approach

The approach to this project is to work on the highest priority items first, delivering groups of functionality in a series of planned releases. This was kicked off with a number of analysis meetings in which Computronix and Riverside teams worked together to define the high-level business requirements. As these requirements were documented and agreed to, a picture of the priority enhancements has emerged. The next steps are to engage in detailed analysis and design processes such that the City and Computronix come to a clear understanding of what and how the high-level requirements will be satisfied. At the point that the City agrees to the proposed design, Computronix will provide updated estimates to complete the work on each enhancement and seek approval to proceed from the City Project Manager. When approval is received, Computronix will begin to configure and develop the enhancements, keeping the City SMEs involved in the process so that minor adjustments can be made prior to delivery for final testing.

As this project from detailed analysis and design to implementation is to be conducted on a time and materials basis, Computronix will provide bi-weekly status updates on the time spent to date, budget used and remaining budget. This will give the city clarity on any adjustments to scope, responsibilities, road blocks and expectations that need to be managed or modified based on the then current data.

Expected Riverside Responsibilities

The City of Riverside will:

1. Provide timely review and approval of Computronix design documents.

2. Work with Computronix to define and document release processes and plans for incremental delivery.

3. Review the high-level test scripts that have been provided by Computronix and use them to develop and review additional UAT test scripts prior to the start of UAT.

4. Based off the CX provided design documentation, the Riverside team will deliver end user training for internal Riverside Staff prior to production roll-out.   This includes any internal procedural changes that support the POSSE LMS software changes.

5. Once CX has completed the unit, cross and system testing within the development environment and has migrated the changes to the UAT environment user acceptance testing ("UAT") of the delivered Planning module enhancements will be performed by designated City of Riverside staff. UAT test scripts will be created and executed by designated City of Riverside staff.

6. Train the trainer training will be provided at the discretion of the Riverside project management team. Training will be completed prior to UAT and performed on a time and materials basis.

7. Notify external customers of the upcoming changes.

8. Build a publicly consumable GIS dashboard.

<u>Warranty</u>

Computronix does not provide warranty for any site-specific configuration developed using time and materials. However, Computronix does commit to providing post-implementation support and fixes, on a time and materials basis, utilizing the same Computronix staff, ensuring consistency, continuity and efficiency in addressing post-implementation support needs.

Out of Scope

1. The City IT staff will address any new reporting requests
2. The City is responsible for all user acceptance testing (UAT) including:
    * Test planning, test script authoring, testing, recording of results, determining the veracity of test results, and logging defects into the defect tracking system

3. POSSE Environment changes such as:

    * Upgrading Oracle or supporting the City's Oracle upgrade tasks with the exception of coordination activities.

    * Refresh of data in the Computronix or the City environment, except for the production support database which will be refreshed after the production upgrade.

    * Changes to servers or VM and no server migrations.

4. Any training environment or End User training. Riverside is responsible for providing the following for planning module enhancements:

    a. Supply of the Training environment containing the planning module enhancements and other in-scope system components. Any required training will be delivered by the Riverside team.

Section 5.0 Location of Project Activities

Computronix will conduct all project activities remotely from its offices in Edmonton, Alberta, Canada.

All services described will be performed by Computronix in-house staff, no sub-contractors will be used to perform these services.

Section 6.0 Project Cost Breakdown

Project Cost Breakdown

This project will be engaged on a time and material basis at a blended rate of $180/hour, except for the High Level Analysis already completed which will be invoiced on acceptance of this SOW and the issuance of the Riverside PO. Once the PO is issued, an invoice of $25,000.00 will be generated and the project will start.

Computronix will provide a monthly invoice at the end of each month for all time and materials work that has been completed in the month. All payments are due within 30 days of receipt of an invoice from Computronix. Total payable for professional services for this engagement is not to exceed $221,100 for the planning enhancements and $30,000.00 for the GIS related enhancements. As this SOW is structured as Time and Materials, activities in the Cost Summary table below may be less expensive than indicated if they take less time than planned, or more expensive if they take more time. Timely status reporting and regular communication of updated estimates of effort remaining will ensure that Riverside and Computronix make informed decisions on time expenditure throughout the project.

The following is a list of items planned for delivery by Computronix and inclusion in this project and the current high level cost estimates associated with each item:

Items to be delivered by Computronix		
Require-ment #	**Title**	**Cost Estimate**
	High Level Analysis Completed (Fixed Price)	$25,000
PL-01	Combine Multiple Application Cases into a singular Case	$20,000
PL-04	Create a singular place for Planning Documents and Conditions	Covered in PL-01
PL-05	Singular display for fees and payments related to a project	Covered in PL-01
PL-06	Singular place to view the Job Status	Covered in PL-01
PL-08	Allow documentation to be added to a closed job	$2,000
PL-09	Updates to the GIS interface and dashboard	$8,000
PL-11	Support for the Housing Approvals Report	Covered in PL-09
PL-12	Support for the Annual Progress Report	$5,000
PL-14	Maintain Planning Subtypes	$4,000
PL-16	Allow users to specify if application documents are provided over the counter	$5,100
PL-19	Linking Conditions to the Parcel	$22,000
PL-21	Track meeting dates	$12,500
PL-26	Update Responsible Planner and Supervisor	$10,000

Items to be delivered by Computronix		
Require-ment #	**Title**	**Cost Estimate**
PL-27	Update the Subtype functionality	$4,000
PL-28	Tracking the final approval method	$17,000
PL-30	Allow workflow steps to be skipped	$20,000
PL-31	New jobs on the Customer Portal	$2,000
PL-32	Ability to search by APN	$11,000
PL-33	Customer Portal Show More Functionality	$2,000
PL-34	Ability to submit additional documents to an in-progress planning case	$19,000
PL-35	Update details shown on Planning Application Details tab.	$32,000
PL-36	Create a read only role to give to other areas.	$1,000
PL-38	Searching by Map	$4,400
PL-41	Updates to the Job Description	$3,000
PL-42	Trigger conditions based on a subtype	$ 10,000
PL-43	Require an Address or Parcel reference when creating a planning case	$ 8,000
	Contingency funding	$79,010
Subtotal		**$326,010**
Items to be delivered by City staff with support from Computronix		
PL-10	Support a GIS Dashboard Update	0
PL-13	Allow Historicity to be tracked on Planning jobs	$770
PL-15	Allow a Specific Location to be selected	$1,930
PL-25	Remove Contractor Functionality	$1,290
CX support effort Subtotal		**$3,990**
Grand Total		**$330,000**

Section 7.0 Progress Report Requirements

Not less frequently than once in every month, Computronix shall submit invoices and/or itemized work documents to the City. The itemized work documents shall include the following information:

Names of Consultant personnel performing work

Dates of Project work

Description of the Project work

Itemized costs set forth in this SOW, including identification of each employee who provided services during the period of the invoice and the number of hours for each such employee will be provided by the Computronix standard Time Detail Report.

The percentage of Project completed as well as total budget utilized will be provided with each set of invoices to allow the City's Project Manager to determine if Computronix is performing to expectations, is on schedule, is within funding limitations, and to also allow City's Project Manager to develop interim findings.

Incomplete or inaccurate invoices shall be returned to Computronix unapproved for correction.

All costs submitted to City must be specifically identified and supported with original receipts, invoices, or statements. Actual costs shall not exceed the estimated wage rates, labor costs, travel and other estimated costs and fees set forth in Section 6 of this Statement of Work.

By the twentieth day prior to the end of a new quarter (i.e., March 20, June 20, September 20), Computronix shall submit a Quarterly Report in a format reasonably acceptable to Riverside's Project Manager. The Quarterly Report shall include, in narrative form, a description of services performed by Computronix as well as progress toward completion of tasks related to the Project for the prior quarter.

Section 8.0 Project Schedule

The period of performance of this project is approximately 9 months. The following is an example schedule which will be finalized with Riverside during the project planning stage of the project.
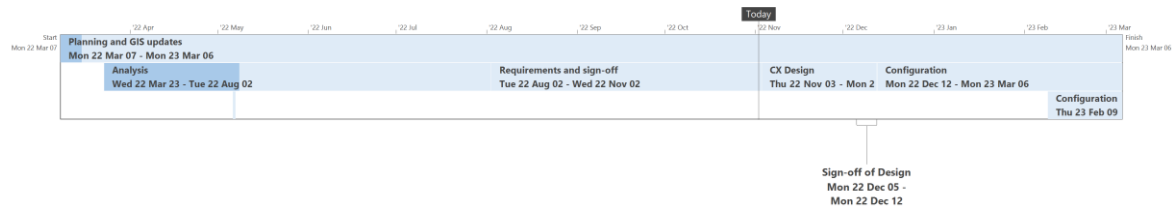
Section 9.0 High-Level Requirements

Below is the list of items and their high-level requirements that are planned for implementation. The requirements have been divided into three categories: items to completed by Computronix, Items that will be completed by Riverside with support from Computronix, and items that will be considered for completion if time and budget allows.

1.   Items to be completed by Computronix in priority order:

Priority	Requirement #	Title	Assumption	Requirement	Response/Comments/Solution Assumptions
1	PL-01	Combine Multiple Application Cases into a singular Case	per job type (development permit, general permit, re-zoning, subdivision, and V&A)	The ability to combine multiple Application Case Sub-Types onto a singular Application Case, giving the user the ability to carry out the work related to one-or-more subtype at the same time.	Computronix will be adding the ability to se-lect a primary sub-type, and then one-or-more secondary sub type on a single Application Case.
1	PL-04	Create a singular place for Planning Documents and Conditions	Covered in PL-01	Creation of a singular place to store the Planning Docu-ments and Conditions that are currently stored on mul-tiple application jobs.	Computronix will be updating the planning jobs to give the ability to create a singular planning job with one or more subtype. Using this functionality, the documents and condi-tions can be stored on one job and be used against multiple types.
1	PL-05	Singular display for fees and pay-ments related to a project	Covered in PL-01	Creation of a singular place to display fees and related payments that are currently stored on multiple applica-tion jobs.	Computronix will be updating the planning jobs to give the ability to create a singular planning job with one or more subtype. Using this functionality, the fees and related pay-ments can be stored on one job and be used against multiple types.
1	PL-06	Singular place to view the Job Sta-tus	Covered in PL-01	Ability to see the status of more than one Application Case in a project in a single location.	Computronix will be updating the planning jobs to give the ability to create a singular planning job with one or more subtype. Using this functionality, the statuses can be viewed on one job and be used against multiple types.

Priority	Requirement #	Title	Assumption	Requirement	Response/Comments/Solution Assumptions
2	PL-08	Allow documentation to be added to a closed job	per job type	Update the Applications Cases to allow documents to be uploaded to a job that has been closed.	Computronix will update Planning Jobs to allow documents to be added to it, by staff, after it has closed.
1	PL-09	Updates to the GIS interface and dashboard	These fields exist in the GIS database. Updating parcel/address data.	The GIS system will be updated to show the following additional items on the dashboard: - Housing Element Sites - Accessory Dwelling Units - Affordable Housing - Housing Entitlement Projects	Computronix will update the existing GIS interface, making the request information available to the GIS layers.
1	PL-10	Support a GIS Dashboard Update	These fields exist in the GIS database. Updating parcel/address data.	Riverside would like to track the following details using a centralized dashboard: - How many affordable housing units are there - What is the status of the affordable housing unit - Where are affordable housing units located	Computronix will provide the data needed for the dashboard as per PL-09 and PL-12. We understand this PL-10 requirement to refer to building the dashboard itself, which is work the city will do, not Computronix. So there is nothing for Computronix to estimate here
1	PL-11	Support for the Housing Approvals Report	This is covered by the 2 rows above (PL-09 and PL-10)	Ability to pull data from LMS to generate a report showing the following: • Housing Element Site • Number of Affordable Units ○ Level of affordability § Low § Extremely Low § Moderate • Infill Development Site (Y/N)SB-35 or SB-330 Approval?	Based on the email sent by Matthew Taylor on 22/05/11, Computronix will add the appropriate fields and values to allow these values to be tracked and reported on.

Priority	Requirement #	Title	Assumption	Requirement	Response/Comments/Solution Assumptions
1	PL-12	Support for the Annual Progress Report	Updating parcel/address data.	Record the following data and generate a spreadsheet based report from it. - Unit Category - Unit Tenure - Total Proposed Units - Approved Units - De-Approved Units - Affordability Level (recorded per unit) - Infill Units Y/N - Deed Restriction - Public Subsidy - Deed Restriction Permanent - Type of Deed Restriction - Demolish/Detroyed Units	Based on the email sent by Matthew Taylor on 22/05/11, Computronix will add the appropriate fields and values to allow these values to be tracked and reported on.
2	PL-14	Maintain Planning Subtypes	May need a data conversion script	Riverside would like to add additional Subtypes, and combine others into a singular type.	Computronix will support the work required to add these new types to the system.
3	PL-16	Allow users to specify if application documents are provided over the counter	per job type	When submitting a new application, staff would like the ability to flag if the documentation was provided over the counter. When provided over the counter, LMS will not require the Application Documents to be uploaded.	The ability to mark documents as having been provided over the counter will be provided. When marked as over the counter, the system will ignore the list of required application documents.
7	PL-19	Linking Conditions to the Parcel	This may only require getting a couple of the condition actions to work	Riverside would like the ability to tie conditions to a parcel, and then have them automatically populate on a permit taken out at that location.	Computronix will investigate the effort to add conditions to the parcel and have them trigger on the corresponding Permits.
7	PL-21	Track meeting dates	assuming we make changes and don't just provide training. Per job type	Riverside would like to be re-trained on how to use the meeting item functionality in LMS to record dates related to the CC, DRC and other meetings.	Computronix will train Riverside on how to use the meeting functionality and support the setup of the meeting item types.
1	PL-26	Update Responsible Planner and Supervisor	per job type	Change the point in workflow where the Responsible Planner and Supervisor are required.	Remove the need to have the Responsible Planner and Supervisor filled out at Completeness check.

Priority	Requirement #	Title	Assumption	Requirement	Response/Comments/Solution Assumptions
2	PL-27	Update the Sub-type functionality	per job type	Remove the lockout when a Subtype has been selected	The subtype is currently locked as soon as staff or the customer select one. This should remain unlocked until the Completeness Check has been done.
2	PL-28	Tracking the final approval method	Adding new outcomes. Per job type	Riverside would like to track how the Planning Case was completed, with the available options being; - DIRECTOR APPROVAL - DRC APPROVAL - CPC APPROVAL - CC APPROVAL - CHB APPROVAL - DENIED - APPEAL	A new list of values will be added on the Complete process. This list will allow the user to select a completion type, which will then be both searchable and reportable.
1	PL-30	Allow workflow steps to be skipped	Assumes we will change workflow on a couple of processes (outcomes leading to other processes)	Add new outcomes to the existing workflow, allowing staff to bypass steps such as the Referrals, Recordation and more.	Computronix will investigate the effort required to add additional outcomes to processes, allowing staff to bypass portions of the workflow as necessary.
1	PL-31	New jobs on the Customer Portal	This is just adding new menu items (assume 3)	Riverside would like to add additional planning workflows, from their existing list, to the Customer Portal for the public to use.	Once the final list of Planning Cases has been decided upon, Computronix will investigate the effort required to add these to the Customer Portal.
3	PL-32	Ability to search by APN	APN separate from address? (public and internal)	Riverside would like the ability to search for and then create a planning application by APN, and well as by Address.	Computronix will investiage the effort required to search by and create it by APN, and make the reference to an APN or Address Mandatory.
4	PL-33	Customer Portal Show More Functionality		Planning Jobs do not show up in the My Activities list unless the Show More link is clicked	Riverside would like the Planning Jobs to show up in the My Activities list in a similar fashion to how the permits do, and not require the customer to click the Show More button.

Priority	Requirement #	Title	Assumption	Requirement	Response/Comments/Solution Assumptions
2	PL-34	Ability to submit additional documents to an in progress planning case	per job type	Allow additional documentation to be uploaded by the customer to an in progress planning case.	We need to know more about when and where, and what, within the workflow.
2	PL-35	Update details shown on Planning Application Details tab.		Riverside would like the details screen for a Planning Case on the Customer Portal to more closely resemble what is displayed for a permit.	We need to confirm what should be displayed before this can be estimated.
3	PL-36	Create a read only role to give to other areas.		Riverside would like to grant read only access to the Planning Applications to other departments, and needs a role to do so.	Computronix will create the role. What should the role be called?
6	PL-38	Searching by Map	Troubleshooting - just a guess	Riverside would like the ability to search for Planning jobs using the map.	We need to know more about what they would like to search for, and what the intended behavior afterwards is.
5	PL-41	Updates to the Job Description		Change the Job Description for each job to: Case #: Status (SUBTYPE) Address (Applicant)	Computronix will investigate the effort required to update the job description.
7	PL-42	Trigger conditions based on a subtype	The system must automatically create a condition on a planning case if a certain subtype is added.		Computronix will investigate the effort required to automatically create a condition on a planning case when a specific subtype is added.
1	PL-43	Require an Address or Parcel reference when creating a planning case	per job type	An Address or Parcel must be added when a planning case is created.	Computronix will make an Address or Parcel required when applying for a Planning job.

2. Items to be completed by Riverside with technical support from Computronix

Prior-ity	Re-quire-ment #	Title	Assumption	Requirement	Response/Comments/Solution Assump-tions
	PL-13	Allow Historicity to be tracked on Planning jobs	Internal site only. Per job type	Riverside would like to have the Historicity drop down, currently on the Building Permits, added to the Planning Jobs.	Computronix recommends that City staff rep-licate the current Historicity function from the Building Permit onto the Planning Jobs.
	PL-15	Allow a Specific Location to be selected	per job type	Allow a "Specific Location" to be entered as a part of the selecting a parcel on the Planning Job.	Computronix recommends that City Staff replicate the Specific Location functionality from the Permit jobs onto the Planning Jobs.
	PL-25	Remove Contractor Functionality	6 per other job type (in-cludes removing Profes-sional section)	The City of Riverside is not using the Professionals/Con-tractor functionality on the Planning Jobs, and Riverside would like to have it removed.	Computronix will support City Staff as they undertake tasks designed to remove the Pro-fessionals/Contractor functionality on both the Staff and Customer Portals.

3. Items that might be included, if possible, and if budget allows.

Prior-ity	Re-quire-ment #	Title	Assumption	Requirement	Response/Comments/Solution Assump-tions
	PL-20	Tracking dates in LMS	per job type	Create new fields on the Planning jobs to track the fol-lowing values; - Friendly Notice Date - Welcome Letter Date - Completion Date - Agency Notification Date	Computronix to investigate the location for these fields and the effort required to add them.