Consulting and General Support Services for Fiscal Year 2014/2015

Project Proposal
June 16, 2014

Presented To:
City of Menlo Park
Attention: Justin Murphy
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Menlo Park, CA 94025-3483
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Presented By:
Synergetic Consulting
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**Business Objectives**

Your jurisdiction wants continued consulting and development support for the current Accela/Tidemark permitting system. Support solutions must facilitate the following processes:

- Modification of existing reports, as requested by Menlo Park staff
- Creation, testing, implementation of new reports, as defined by Menlo Park staff
- Modification of existing cases and migration of data as needed, as defined by Menlo Park staff

**Consultant Experience**

Synergetic Consulting has over 15 years of experience working with municipalities across the United States. Many of those jurisdictions use, or have used, the Tidemark Advantage Permit Plan system for issuing permits.

Our staff’s extensive software implementation and development skills will deliver a system that incorporates the latest technologies to enhance the City’s current processes and minimize the impact on the City staff involved in the project.

Synergetic Consulting has completed numerous projects that range from complete analysis, design, development, and implementation of systems for organizations that produce over 10,000 building permits a year, to general support services for other communities.

We have been intimately involved in the implementation and enhancement of process management systems for a wide variety of agency types that include: Building, Planning, Engineering, Transportation, Code Enforcement, Public Works, Fire, City Clerks, Municipal Courts, Animal Control, and others.

This wide range of experience gives Synergetic Consulting’s staff the broad understanding of how municipal processes work and how to deliver the best-of-breed solutions to enhance those processes. We are able to bridge the gap between the business operations of an organization and the technical aspects required to reach a clear understanding of the project and its implementation.

Synergetic Consulting’s knowledge of the process management methodologies of virtually all departments within a municipal organization allows our staff to implement a solution that exceeds the expectations of our clients.
Consulting Services

Synergetic Consulting offers a wide range of technology oriented consulting services. We have listed many of our primary services below. Other services include: database integration to new systems, automated data entry systems, database management, and project planning.

Training
Synergetic Consulting provides both on-site and webinar-style training. Custom training can be created for your jurisdiction or department's specific system and processes. We also can train your staff with report design and improvement, and working with triggers, scripts and specific system utilities, or process documentation.

Software Support
The software support services are designed to assist clients with use, upgrading, and support of installed applications and environments. This can include: installation, product enhancement, upgrades, interfacing to other applications, and support questions.

Report Development
Our team of developers can assist you in the needs analysis, design, and development of a wide variety of reports utilizing Crystal Reports, MS Access, and other reporting products. Our developers are experienced in designing new reports, upgrading current reports, troubleshooting non-operational reports, and improving the efficiency of reports.

Web Design and Development
Our web design and development group is focused on the development of web sites that integrate to client database applications for the retrieval, entry, and updating of live information from the client's systems.

Data Conversion
Our analysts and developers have extensive experience in mapping and converting data from diverse systems. Our team has completed many data conversions to and from legacy systems, mainframe applications, and client-server SQL database environments.

Systems Analysis and Design
Our systems analysis services are designed to provide an in-depth problem analysis and definition for use in project feasibility and/or application development. Our analysts work with your staff to determine the needs and requirements for your system and create the final documentation for the development or implementation of the recommended solutions.
Application Development

Our team of developers can provide complete application development for a wide array of application platforms. We have experience in single and multi-user applications for stand-alone databases, client-server environments, and web-enabled systems.
Consulting and General Support Services Pricing

In order to provide our clients the most flexibility in how they utilize Synergetic’s services, we have developed three different General Services plans. These plans allow your organization to decide the level of services desired and the rate level that fits within your requirements and budget.

Synergetic Consulting provides the following three different methods for obtaining general support services:

- **Non-Contract “ad-hoc” services** – these hours do not require a contract and can be requested at any time by a client requiring assistance with their systems or developmental services. These hours will be billed at the end of each calendar month at the current non-contract services rate. Rates provided in this proposal for non-contract services are in effect at the time of this proposal and are subject to change without notice for non-contract services.

- **Graduated Usage Contract Services** – this type of contract allows your organization to start using Synergetic Consulting’s services at our lowest number of hours for contract pricing. As your organization uses service hours the pricing will automatically move to the next price break level as the hours are used and billed. There are no minimum usage requirements for this option and no commitment for a minimum number of hours.

- **Block Contract Services** – in this type of support agreement, your organization contracts for a specific minimum number of billable hours over the term of the contract in order to receive the specified rate for all those hours used.

If the number of hours used exceeds the upper hours range for the rate level quoted, the billing rate for additional hours above the selected range will move to the next lower rate in the Graduated Usage Contract Services chart.

If the minimum number of hours contracted are not used within the contract period, at the end of the contract period any hours billed at the minimum usage rate would be reverted to the applicable Graduated Usage Contract Services rate and the difference in rate for the actual hours used would be billed for the hours actually used during the contract period.
Non-Contract “ad hoc” Pricing
Non-contracted work hours are charged at $150 per hour, in quarter-hour increments, with a minimum of one hour per incident. Evening, weekend, and holiday hours are billed at $180 per hour.

On-site visits are billed at $180 per person per hour, with a 2-day minimum (2 x 8 x $180 = $2,880). $220 per hour is charged for on-site early mornings, evenings, weekends, holidays, or overtime. Standard hours are Monday-Friday 8:00 am to 5:00 PM Pacific time for off-site work and the same time range in the local time zone for on-site work.

Graduated Usage Contract Services Pricing
The Graduated Usage Contract allows your organization to start saving from the first hour used and gain additional savings as hours are used without requiring any minimum usage. As the hours get used, they are invoiced according to the range.

Both remote and on-site hours can be combined to qualify for an Hours Range level in the rate chart below:

<table>
<thead>
<tr>
<th>Hours Range</th>
<th>Remote Work Hourly Rate</th>
<th>On-Site Work Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 40</td>
<td>$125</td>
<td>$150</td>
</tr>
<tr>
<td>41 – 200</td>
<td>$115</td>
<td>$138</td>
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<tr>
<td>201 – 500</td>
<td>$105</td>
<td>$126</td>
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<tr>
<td>1001 – 2000</td>
<td>$75</td>
<td>$90</td>
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<tr>
<td>2001 - 5000</td>
<td>$70</td>
<td>$84</td>
</tr>
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</table>

Example
Your organization issues a one-year Purchase Order with a non-to-exceed amount of $50,000 and uses the following number of hours within that year:

The first 40 hours are billed at $125 per hour.  40 x $125 = $5,000
The next 160 hours are billed at $115.  160 x $115 = $18,400
The remaining hours are billed at $105.  253 x $105 = $26,565
Actual cost of 453 hours  $49,965
Block Contract Services Pricing
The Block Contract Services provide the best hourly pricing for your organization. It allows you to decide what price level you want based on the number of service hours you are willing to commit to utilizing. By signing up for a block of hours you get the listed price for duration of contract.

As listed above, there are rate adjustments for not meeting the minimum and rate decreases for hours used above the upper range of the pricing bracket.

Both remote and on-site hours can be combined to qualify for the minimum contracted hours in the rate chart below:

<table>
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<tr>
<td>1 – 40</td>
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</tbody>
</table>

Example
Your organization enters into a two year contract for a block of Block of hours between 1,001 to 2,000 hours at $75 per hour.

Scenario 1: During the contract period your organization uses 2,500 hours and the following amounts are billed:

First 2,000 hours are invoiced as: 2,000 x $75 = $150,000
Additional 500 hours are invoiced as: 500 x $70 = $35,000
Actual amount billed for 2,500 hours $185,000

Scenario 2: During the contract period your organization only uses 453 hours and the following amounts are billed:

Actual utilized hours of 453 invoiced at $75 per hour 453 x $75 = $33,975
End of contract period adjustment to 201-500 rate 453 x $30 = $13,590
Actual cost of 453 hours $47,565
Consulting and General Support Services Terms and Conditions

The following sections define Synergetic Consulting’s general terms and conditions for the services in this proposal.

**General Conditions**
Other than payments due upon start of a project, our normal terms have all invoices due and payable within 30-days from the date of the invoice. If the account exceeds the 30-day term on undisputed amounts and the Client is unable to commit to payment within a reasonable period of time, an interest of 1.5% per month shall be applied to the outstanding delinquent amount and the project or services may be placed on hold until the account is brought current.

**Quick Pay Discount**
If the invoice is fully paid within 15 days, a 2% discount may be applied to that invoice. We use a check’s postmarked date to identify the payment date.

**Billing Periods**
When there are more than 40 billable hours within a two week period, it will be invoiced on a bi-weekly basis. When a month contains less than 40 hours of billable hours, it will be invoiced monthly.

Consulting and General Support services are billed separately from product purchases.

**Standard Work Day, Off-Site/Remote**
Our standard eight-hour workdays are Monday through Friday, between 8 am and 5 pm Pacific time. Work is billed in quarter-hour increments. The next higher rate per hour is charged for early mornings, evenings, weekends, holidays, or overtime. Contracted workday times may be negotiated to comply with jurisdiction’s local time.

See “Consulting and General Support Services Pricing” for pricing rates.

**On-Site Visits**
The on-site visits will be scheduled with your jurisdiction and it is your responsibility to insure that all needed personnel are available for the on-site visit. On-site visits are billed per person per local workday. The next higher rate per hour is charged for early mornings, evenings, weekends, holidays, or overtime. There is a two eight-hour day minimum (2 x 8 x $180 = $2,880) for on-site visits.

See “Consulting and General Support Services Pricing” for pricing rates.
If you need to change the schedule for on-site visits, 14 days advance notice must be provided to Synergetic Consulting. On-site time is separate from Travel Expenses.

**Travel Expenses**
For any on-site work, out of the Reno-Sparks, Nevada area, or if specialists are required to travel to the Reno/Sparks area for this project, the Client will be billed for the applicable actual airfare, ground transportation (including tolls, parking, and fuel), lodging costs, and $65 per-diem per day for each Synergetic Consulting staff member required on-site. Traveling time will be charged at $50 per hour, for each Synergetic Consulting staff member required on-site.

Our best efforts will be used to find the most economical pricing for all travel costs.

**Taxes**
The client is responsible for payment of all federal, state (or provincial), and local taxes and duties (except those based on the income of Synergetic Consulting). If you are exempt from certain taxes, you need to provide Synergetic Consulting with a certificate of exemption issued by the applicable taxing authority.

**Scope Changes**
As part of Synergetic Consulting's Project Management methodology, when the scope of a project changes in any measurable way, the assigned Project Manager will complete a Scope Change document. The document will outline the nature and impact of the proposed scope change on the overall project. Before any work towards the Scope Change is started, an authorized Client Representative must sign off on the Project Change Order, acknowledging the potential time and/or cost impact on the project caused by the Scope Change.

**Source Code Licensing and Ownership**
Software source code developed specifically for the Client's projects will become the sole property of the Client.

Any Synergetic Consulting standard libraries or third-party libraries (non-customized portions of a project's code) that are utilized in the implementation of the Client's system will be licensed to the Client on a non-exclusive basis for use within the Client's organization. Your license for Synergetic Consulting libraries includes unlimited use within your organization, but not rights for selling or giving away of the Synergetic Consulting libraries without prior written permission. Third-party libraries used in any projects will be covered by the respective vendor's licensing terms.

**Cancellation Policy**
If your jurisdiction cancels the project after work specifically for your project has been started, your jurisdiction will be billed for all consultative hours already used in connection with the project (prior to receipt of notice of termination) at our current
standard single hour rate for the type of services performed. All expenses incurred (prior to receipt of notice of termination) specifically for the project will also be due and payable, these include: travel, purchase of products to be delivered to your jurisdiction, or any other specifically listed expenses. Upon receipt of notice of termination, Synergetic Consulting shall immediately cease all work on the terminated project. City shall not be obligated for any fees, costs, charges or expenses incurred by Synergetic following the receipt of the notice of termination. An authorized Client Representative (listed on last page) must issue the notice of termination or reinstatement of a project.

Expiration of Offer
The estimates, rates, terms, and conditions of this proposal are effective for sixty (60) days from the date of this proposal. Should the decision to move forward with the project exceed that timeframe, Synergetic Consulting's estimates, costs, and availability may change.
Conclusion and Signatures

Synergetic Consulting has the resources, expertise, and proven track record in working with government organizations to provide a superior solution to your needs. We believe in maintaining a long-term collaborative relationship with our clients and look forward to continuing our relationship with your jurisdiction.

Thank you for the opportunity to submit this proposal to your organization. Should you have any questions or need further clarification on any component, please contact your account representative at 775-284-3400.

General Support Services Total
The Not-To-Exceed total investment for General Support Services for the Fiscal Year 2014/2015 is $25,000.

Pricing will be by Graduated Usage or by Block Contract Services Pricing.

Accepted by: Arinda Heineck
Title: Community Development Director
Date: 9/24/2014

City of Menlo Park, California
701 Laurel St.
Menlo Park, CA 94025-3483

Client Representative(s) authorized to approve Scope Changes:

Justin Murphy