

ProjectDox

City of Salinas, CA

Professional Services Engagement Proposal

November 1, 2023



Prepared by your Avolve Software Representative

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ProjectDox® Price Quotation

Quote Delivered To

Angeline Sickler

Senior Plan Check Engineer
afarias@markham.ca

Salinas CA
(831) 998-1657

65 West Alisal Street
Salinas, California 93901
United States

Date of Quote: 11/1/2023

Quote Valid Until: 12/22/2023

ProjectDox ePlan Solution Pricing Agreement

PROFESSIONAL SERVICES

| Product Name | Product Code | Description | Qty | Unit Price | Total Price |
|---|--------------|-----------------------|-------|------------|-------------------|
| Professional Services | PS-225 | Professional Services | 40.00 | \$225.00 | \$8,550.00 |
| Professional Services Sub-Total: | | | | | \$9,000.00 |

| | | |
|--|---------------------|-------------------|
| <p>Unless otherwise stated, pricing does not include any applicable taxes that may be applied at invoicing. Travel and Expenses are not included in this total and will be invoiced as incurred.</p> <p>The City will be invoiced monthly based on the number of Professional Services hours (excludes training and client success services) at the hourly rate (\$225) consumed during the previous month. A short description of each time entry and a time tracking spreadsheet will accompany the invoice each month and the number of hours remaining in the project budget. Payment for the remaining amount is due net thirty days (30) from project completion.</p> | Grand Total: | \$9,000.00 |
|--|---------------------|-------------------|

NAME: _____

TITLE: _____

SIGNATURE: _____



ProjectDox® Price Quotation

DATE: _____

By signing this Order Form customer acknowledge and agrees to, if purchasing (a) licenses and/or support and maintenance, Avolve's Software License and Support Agreement General Terms and Conditions and Avolve's Maintenance and Support Level Agreement; (b) professional services, Avolve's Professional Services Agreement; and (c) training services; and (d) hosting services, Avolve's Hosting Service Level Agreement. Customer acknowledges that it has been provided reasonable access to the applicable documents listed herein online at www.avolvesoftware.com and knowingly consents to the same. Resellers acknowledge that they will have end users formally acknowledge and be bound by all applicable Avolve Terms and Conditions as described above.

ProjectDox

Electronic Document Management & Collaboration Solution

Proposed Statement of Work

November 1, 2023



EXECUTIVE SUMMARY

This Statement of Work will focus on a new self-service OAS process wherein applicants will be able to create a new SolarAPP+ application, submit and make a payment, and have a job card as well as a window card delivered to the applicant. The application will also be integrated with the City's TRAKiT permit system. This is a new City obligation to meet the requirements of SB379 for SolarAPP+ applications. The City is looking for a process where a permit can be obtained in real time. There will be no workflow within ProjectDox, and this process will be solely in the OAS application.

SCOPE OF WORK

SolarAPP+ Project Implementation

A summary of the scope is below.

- Design of OAS SolarAPP+ Self-Service Application seen as Exhibit B
 - Includes a method wherein certified the solar app contractor is validated before allowing to proceed with application submission.
- Configuration of OAS Payment using existing Authorize.net payment processor
- Design of job card draft design seen as Exhibit C
 - TRAKiT permit number must be pulled and displayed on the job card.
 - Job card is emailed to the applicant.
- Design of Window card design seen as Exhibit D
 - TRAKiT permit number must be pulled and displayed on the job card.
 - Job card is emailed to the applicant.
- OAS to push information application information to TRAKiT.
- OAS to pull TRAKiT permit number for use on job and windows cards.
- OAS will display a static fee for payment or use of fee formulas in OAS.
- Enable the upload of single files into OAS for small number of files.

Integration between OAS and TRAKiT requires the TRAKiT permitting system to have the required API's/ web services to facilitate communication. If APIs are not currently present and functional, the Customer will need to provide the resources to develop and test any new required services and Avolve will assist in testing. Any additional integration points other than what is described below would be considered additional scope and would require additional professional services (assurance services) to cover design, development, and testing. Direct database calls are not supported.

- TRAKiT permitting system integration includes:
 - SolarAPP+ Information Push – OAS to push the SolarAPP+ application information to TRAKiT.
 - Leverage existing Address and Owner lookup code designed by Avolve and used by the City of Salinas from other applications.
 - Permit Number Collection – OAS to call TRAKiT to retrieve the permit number prior to entering on job and window cards.

ACCEPTANCE PROCESS

There will be Key Deliverables within the identified phases of the project as identified in the Project Activities/Deliverables Schedule which will be subject to acceptance by the Customer ("Acceptance"). Upon completion of each Key Deliverable, Avolve will request from the Customer a written response/acceptance within five (5) business days after receipt thereof. Notwithstanding the foregoing or anything to the contrary in the Purchase Agreement, all other Deliverables provided under this Statement of Work shall be deemed to have been accepted by the Customer upon delivery. If Customer does not approve, reasons for rejection must be clearly noted. Avolve will then work with the Customer to come to agreement on obtaining approval. The Customer shall be deemed to accept any such Key Deliverable which the Customer does not accept or reject within such period. This acceptance will initiate the invoice of the milestone, if applicable.

PROJECT ASSUMPTIONS AND CAVEATS

1. Avolve will have full access to all Project team members from the customer, as needed, to complete the successful implementation and roll out of ProjectDox. This access may require the team members of the customer to dedicate specific time to specific detailed tasks within the Project Plan. Team member tasks will be more clearly defined during the kickoff and planning sessions and documented in the Project Plan.
2. Customer and its third parties and/or subcontractors will fulfill any hardware/software requirements, including the purchase/development of APIs (Application Program Interface) for integration to allow for communication between Avolve Software and the Customer's permitting system in a timely fashion to keep the Project Plan on schedule.
3. Delays/schedule Changes: This best approach package to implementation relies on partnership with the jurisdiction to achieve desired go-live goals. Should either party cause or contribute to the delay of any deliverable/milestone relative to the agreed upon Project Plan schedule, the other party may issue a Change Request(s)/Work Order s to denote said change of schedule and any reasonable incremental costs incurred by such party arising from the delay. Once approved by the parties, the Change Request/Work Order shall be signed by both Avolve and Customer, with issuance of payment for any additional costs as noted within said Change Request/Work Order to occur as set forth in such Change Request/Work Order.
4. Scope Changes: Should the Customer request a change in the scope of work for the project, Avolve shall issue a Change Request(s)/Work Order to denote the change in scope (and any associated impacts to schedule or change to project fees). Once approved by the parties, the Change Request/Work Order shall be signed by both Avolve and Customer, with issuance of payment or credit (as applicable) for any change to project fees as noted within said Change Request/Work Order to occur as set forth in such Change Request/Work Order.
5. All parties will reasonably prioritize their efforts to meet the Project Plan schedule in order to achieve a rapid roll out model. It is understood by all parties that multiple tasks may be in process at one time and Avolve may have more than one Professional Services team member working on the project at one time.
6. Customer will assign a project manager for management of their own resources, and/or third parties retained by Customer, to collaborate with Avolve's project manager. Customer subject matter experts and applicable users will be accessible and available in a timely fashion, and for adequate and reasonable durations as set forth in the Project Plan. Avolve and Customer will make sure that scheduling of meetings is made at least 5 days in advance of these resource allocations.
7. Any optional items chosen in the Purchase Agreement/Sales Order are not included here and would require a modification to this Statement of Work.



8. Customer understands that an ePlan Life Cycle implementation is a significant digital transformation enterprise project that requires dedicated change management from the Customer's staff. This will be key for the success of the Customer.
9. Work will not begin until an executed copy of all paperwork is complete. Work will begin at the earliest date at which Avolve resources and Customer resources are available or as otherwise agreed to.
10. Avolve and Customer agree to cooperate in good faith to complete the Services and Deliverables in a timely and efficient manner.
11. Recording of Avolve provided training or UAT (user acceptance testing) sessions is not permitted unless noted within the Statement of Work.
12. In the event the Customer delays the progression of the implementation and Avolve Software resources are placed on-hold and/or removed from the project, all hours that have been completed to that point will be invoiced. Avolve Software will not guarantee Project Managers and/or Technical Avolve resources will be available to re-deploy immediately upon resolution of the issue. Avolve requires 4 weeks' notice of intent to restart the project, to assess available resources to determine the next available timeframe and communicate any restart costs to restart the project.

CHANGE CONTROL PROCESS

The "Change Control Process" is that process which shall govern changes to the scope of the Project during the life of the Project. The Change Control Process will apply to new components and to enhancements of existing components. The Change Control Process will commence at the start of the Project and will continue throughout the Project's duration. Additional procedures and responsibilities may be outlined by the Project Manager identified on the signature page to the Agreement and will be included in the Project Plan if mutually accepted.

Under the Change Control Process, a written "Change Request" (attached) will be the vehicle for communicating any desired changes to the Project. It will describe the proposed change; the reason for the change and the effect the change may have on the Project. The Project Manager of the requesting party will submit a written Change Request to the Project Manager for the other parties.

All parties must sign the approval portion of the Change Request to authorize the implementation of any change that affects the Project's scope, schedule, or price. Furthermore, any such changes that affect the scope of this SOW, schedule or price will require an amendment to the SOW and/or any other part of the Purchase Agreement.

PRICING, TRAVEL AND EXPENSE

Pricing and payment terms are as set forth in the Purchase Agreement/Sales Order.

- Professional Service hours will be invoiced monthly as time and materials based on the rate for the applicable resources. Avolve will provide monthly balances for hours remaining for the project.
- Training is not included in this SOW.
- Travel and Expenses are not included in this SOW.



PROJECT ACTIVITIES / DELIVERABLES PAYMENT SCHEDULE

Preliminary project and deliverable schedules are provided and are subject to change based on discussions to occur post the kick-off of the project, provided that both the Customer and Avolve Software agree to the updated terms in writing. The project scope and associated costs are based on a 16-week implementation schedule.

For the avoidance of any doubt, all right, title and interest in and to the Deliverables (including without limitation the above Key Deliverables), as well as the intellectual property rights to such Deliverables, shall belong to Avolve, subject to the limited license granted to the Customer pursuant to the Licensing Agreement.

23 WEEK SCHEDULE

| Est Schedule | Project Phase | Deliverables | Deliverable/Acceptance Criteria |
|--------------|------------------------|---|---------------------------------|
| Week 1 | Kickoff | <ul style="list-style-type: none"> Project Kick Off Meeting Project Plan | Project Plan Accepted |
| 2-5 | Orientation and Config | <ul style="list-style-type: none"> Configure SolarApp+ application. Configure OAS Letters Setup Solar Payments | |
| 6-8 | Integration | <ul style="list-style-type: none"> Field Mapping w/ TRAKIT Permit Number Retrieval Deliver Functional System for Testing | |
| 9-12 | UAT | | Sign Off Acceptance Document |
| 13-16 | Launch/Go-Live | <ul style="list-style-type: none"> Launch of Process Warranty Period | Sign Off Acceptance Document |



STATEMENT OF WORK ACCEPTANCE

Once fully executed, this document will become the Statement of Work for the Project defined in this document. Avolve and Customer's signatures below authorizes Avolve to begin the services described above and indicates Customer's agreement to pay the invoices associated with these services delivered as described.

AUTHORIZED SIGNATURES

Avolve Software Corporation

City of Salinas, CA

By: _____

By: _____

Name: _____


Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

| | | | | | |
|---|--|---|-------------|----------|--|
|  | | Avolve Software Change Request Form <i>City of Somewhere</i> | | | |
| / | | | | | |
| GENERAL INFORMATION | | | | | |
| Change Request # (CR) | | | | | |
| Project/City/County | | | | | |
| Requestor Name | | | | | |
| Description of Change | <i>[Enter a detailed description of the change being requested]</i> | | | | |
| Date Submitted | | | | | |
| Priority | Low | Medium | High | Required | |
| Reason for Change Request | <i>[Enter a detailed description of why the change is being requested]</i> | | | | |
| Project Artifacts Impacted | <i>[List other artifacts affected by this change]</i> | | | | |
| Assumptions/Risks | <i>[Document assumptions or comments regarding the requested change]</i> | | | | |
| Comments/Considerations | <i>[Enter additional comments]</i> | | | | |
| Attachments/References | | | | | |
| ESTIMATES | | | | | |
| Total Estimated Development Hours | <i>[#hrs]</i> | <i>[Enter the hour impact of the requested change]</i> | | | |
| Total Estimated Development Duration | <i>[#dys]</i> | <i>[Enter the duration impact of the requested change]</i> | | | |
| Schedule Impact | <i>[WBS]</i> | <i>[Detail the impact this change may have on schedules]</i> | | | |
| Cost Impact | <i>[Cost]</i> | <i>[Detail the impact this change may have on cost]</i> | | | |
| Comments/Recommendations | | | | | |
| PM Approval Signature | | | | | |
| Date Signed | | | | | |
| IDS Approval Signature | | | | | |
| Date Signed | | | | | |
| CITY OF SOMEWHERE AUTHORIZATION | | | | | |
| Customer Approval Signature | | | | | |
| Date Signed | | | | | |
| Avolve Software 01/01/2015 | | | Page 1 of 1 | | |

October 16, 2023

Request Name: SolarAPP+ Permit Application

SolarApp+ Permit Application

CITY OF SALINAS

COMMUNITY DEVELOPMENT DEPARTMENT

65 W Alisal Street, Salinas, California 93901

TEL: (831) 758-7251 | FAX: (831) 758-7938

WWW.CityofSalinas.org/Our-City-Services/Permit-Center

Project Information

INCOMPLETE

SolarAPP+ Approval ID Number *

SXXXXXXXXX-X-X-X

Proposed Type of Work *

- Solar Photovoltaic System
- Solar Photovoltaic and Battery Storage System
- Battery Storage System

Proposed Type of Project * Residential

Brief Description of Work *

Maximum 60 Characters

Valuation *

Approximate cost for labor and materials

If the Property Address is not current or not showing, please email the Salinas Permit Center at paperlesspermit@ci.salinas.ca.us

Project Address *

The Address must be selected from the drop down to be valid. If the address entered is not valid, the form may not be submitted.

Project City *

Project State *

Project Zip Code *

Project Parcel *

Project Subdivision

Owner

INCOMPLETE

If the Owner information is not current, please email the Salinas Permit Center at paperlesspermit@ci.salinas.ca.us

First and Last Name *

Address

City

State

Zip Code

Country

Email *

Phone Number

Contractor

INCOMPLETE

License Number *

Enter Contractor's License Number and select Lookup

Lookup

Name *

Phone Number

Address

City

State

Zip Code

Email

Applicant Information

COMPLETE

Applicant First and Last Name *

ANGELINE SICKLER

Phone Number *

(831) 758-7366

Applicant Address *

65 W Alisal

Applicant City *

Salinas

Applicant State *

CA

Applicant Zip Code *

93901

Applicant Email Address *

angelines@ci.salinas.ca.us

Driver's Licence Required for Issuance

After you press the submit request button below, you will receive an email prompting you to upload and submit. Do not forget to upload a scan of your driver's license or permit inspection scheduling will be delayed.

Signature

INCOMPLETE

I hereby declare that I have read and understood the above, and the information contained in this application, attached schedules, attached plans and specifications, and other documents is true to the best of my knowledge.

I, being the authorized applicant, acknowledge that:

1. I have personally examined and am familiar with all the information submitted in response to the questions contained in this notice, and any attachments, and attest that all information submitted is true, correct and complete; and
2. I understand and agree that clicking the box above will be deemed the equivalent of a signature in electronic form.

Applicant: ANGELINE SICKLER

Signature date:

Save for Later

Submit Request

[Home](#) | [Profile](#)

**Exhibit C:
Job Registration Card Example**



CITY OF SALINAS
Permit Center Division
Community Development
65 W. Alisal Street, Salinas, CA 93901
(831) 758-7251 epermit@ci.salinas.ca.us

BUILDING CODE EDITION: 2022 PLANS

| | | |
|---|--|---|
| PERMIT NUMBER: S23-0006 | JOB ADDRESS: 1519 BOYLE CT | DATE ISSUED: 1/19/2023 |
| JOB DESCRIPTION: 6.630 KW - 17 PANEL ROOF MOUNTED PV SOLAR SYSTEM | | |
| OWNER: HALL JON M 1519 BOYLE CT SALINAS, CA 93906 | CONTRACTOR: SUNRUN INSTALLATION SERVICES INC License No 750184 | FINAL DEPARTMENT CLEARANCES B |

Inspections requests before 4:00 PM PST will be scheduled the next available day
Inspection requests made after 4:00 PM PST will be scheduled two business days later (excludes holidays and weekends)

**RECORD OF INSPECTION TO BE POSTED IN A CONSPICUOUS PLACE ON THE JOB
UNTIL FINAL BUILDING INSPECTION AND/OR CERTIFICATE OF OCCUPANCY**

**INSPECTION CANCELLATION MUST BE 24 HRS IN ADVANCE
OR A REINSPECTION FEE WILL APPLY
If an inspection fails, a reinspection fee will apply**

INSPECTION PROCEDURES:

Morning M-F: 8:30 a.m. - 12:30 p.m.
Afternoon M-F: 12:00 p.m. - 4:30 p.m.

Work must be completed prior to scheduling inspections. Inspectors may show up at any time depending on workload.

| Insp. # | Inspection Type | Date | Insp. |
|---------|------------------|------|-------|
| 1540 | SERVICE UPGRADE | | |
| 5050 | FINAL ELECTRICAL | | |
| 5060 | FINAL BUILDING | | |

FEDERAL EPA ASBESTOS NESHAP REGULATION STATEMENT

If asbestos is discovered, I will contact the Monterey Bay Air Resources District to determine if the asbestos regulation is applicable to this project.
(MBARD) (831) 647-9411 - www.mbard.org

THE ABOVE APPROVAL GRANTS PERMISSION TO DO THE WORK COVERED BY THIS APPLICATION AND PERMIT IN ACCORDANCE WITH PLANS AS APPROVED AND ALL APPLICABLE CITY AND STATE ORDINANCES, REGULATIONS AND LAWS GOVERNING LOCATION, CONSTRUCTION AND OCCUPANCY OF BUILDING. THIS PERMIT EXPIRES IF THE BUILDING OR WORK AUTHORIZED HEREIN IS NOT COMMENCED WITHIN 180 DAYS FROM THE DATE OF APPROVAL, OR IF WORK IS SUSPENDED FOR A PERIOD OF 180 DAYS. THIS PERMIT MUST BE RENEWED BEFORE THE WORK MAY BE COMMENCED AGAIN.

**Exhibit D
Window Card**



S23-0006

| | | | |
|--------------|--|---------------|-------------------|
| SITE ADDRESS | 1519 BOYLE CT | | |
| DESCRIPTION | 6.630 KW - 17 PANEL PV SOLAR SYSTEM | | |
| CONTRACTOR | SUNRUN INSTALLATION SERVICES | 750184 | |
| | INC | | |
| JOB VALUE | 12,597.00 | ISSUED DATE | 01/19/2023 |