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City of Jacksonville, Florida
Procurement Award Form (PAF)

Part 1: Form Type JPAC Award Request and Administrative Details

Goods and/or Services: PSC-0433-24 - Increase Award

Requested Action/Authority:

Request approval to increase the award with Accenture LLP under PSC-0433-24 (contract #71382-24) by $561,496.00 for the addition of a Grants Management Module under the scope of the ongoing General Salesforce Public Sector Platform Implementation Project. Total revised not-to-exceed award amount will be $1,694,984.00.

Justification/Explanation:

PSC-0433-24 Piggyback Miami-Dade Customer Relation Solution Contract No. RFP-01690 with Accenture LLP (COJ contract #71382-24) was awarded in the not-to-exceed amount of $1,133,488.00. The increase will fund an additional module for the COJ Grants Division. This award will be funded from multiple accounts.

Legal Contract #:	71382-24	Contract Date:	8/1/2024	Change Order/AMD #:	01	
PO/Release #:	TBD	Bid Date:	11/21/2024	Awarded Supplier:	Accenture LLP	
Licenses Verified:	N/A	Effective Date:	11/21/2024	Basis of Award:	N/A	
Federally Funded:	No	No. Invited:	N/A (piggyback	Responses Received:	N/A	Attachments:
Solicitation:	N/A - PSC-0433 - 24			Procurement Contract #:	POA - 71382-24	
Executed By:	Office of General Counsel					

PoP:Base:	5 years	Options:	None	Extension(s):	N/A
JSEB Rec.:	Encouragement	%:	0	Bonds Waived Pursuant To:	N/A

Fund:	00000	Center:	000000	Acct:	000000	Proj:	000000	Activity:	00000000	$	561,496.00
Fund:		Center:		Acct:		Proj:		Activity:		$	
Fund:		Center:		Acct:		Proj:		Activity:		$	

New NTE/GMP:	$ 1,694,984.00	Contingent Amount:	$ 0.00	DMP/ODPO Amount:	$ 0.00

Using Agency/BU:	AFIT:INFORMATION_TECHNOLOGIES			
Concurrence:	Signed by: Moore, Jeff B9EB38C710D4E1...	Title:	ASST INFO TECH OFFICER - PMO MANAGER	11/14/2024
Concurrence:	Signed by: Kendrick, Wanyonyi F3E522F095434F5...	Title:	DIRECTOR OF TECHNOLOGY SOLUTIONS	11/14/2024
Concurrence:		Title:		
Concurrence:		Title:		

Procurement Analyst/Buyer:	Signed by: Simpson, Sandy 70B6178457F44E...	Chief of Procurement:	DocuSigned by: B19F1D517352456... 11/18/2024
Name:	Simpson, Sandy	Name:	Dustin L. Freeman

Part 2: JPAC Actions on Above Requests/Recommendations
All Award Actions Subject to Lawfully Appropriated Funds

Members Who Approve:	
Members Who Disapprove:	
Other Action:	

Date:

Part 3: Final Awarding Authority Action

Action:

Date:

Signature:

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PAF Instructions

Form Type: Select the type of award from the dropdown options. This form will be used for all Procurement awards (Administrative Awards and JPAC Requests).

Goods and/or Services: Enter a brief description of the types of goods and services included in the request.

Requested Action/Authority: Enter a brief description of the requested action or authority being sought. i.e.; *request permission to award to the lowest, responsive responsible bidder for ITB or award the highest ranked supplier for an RFP*.

Justification/Explanation: Enter a brief justification or explanation for the requested action. Use this box to add any additional information such as additional account strings, or other information essential for contract execution.

Legal Contract Number: Provide the existing City contract number if applicable. This will be the same number as your POA number.

Contract Date: Select the effective date for the contract using the calendar option in the form. Leave blank for contracts to become effective on the execution date.

Change Order/AMD #: Provide the applicable Change Order or Amendment number represented by this request.

Date: Enter the date of PAF submission.

Effective Date: Enter the effective date of requested authority and/or action.

Solicitation: Select the competitive procurement method used (1Cloud generated prefix), enter the 1Cloud generated numbering sequence, and 1Cloud generated fiscal year of solicitation

Basis of Award: Select from Lowest Price Technical Acceptable (LPTA), Highest Price Technical Acceptable (HPTA),

Procurement Contract #: This is your PO number. Select Type, Enter Number

PO/Release Number: Enter PO Release Number

Awarded Supplier: Enter Awarded Supplier Name

Federally Funded: Select yes or no from dropdown if Federal Funds will be used.

Responses Received: This is the number of responses received.

No Bids Received: The number of responses received that indicated supplier would not bid.

Executed By: Select whether executed by OGC or JPAC / Chief of Procurement

PoP Base: Select the Period of Performance for the initial period.

Options: Period for each renewal period i.e. one (1) two (2) year.

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Extensions: How many extensions have we preformed after the initial base period and option periods have been completed?

JSEB Goal: Select the percentage established by JSEB.

JESB Other: Select Encouragement or Set Aside Option

Bonds Waived Pursuant to: Select authority allowing bonds to be waived.

Funding Source: Fund/Center/Account/Project/Activity, all fields are required even if zeros.

New NTE/GMP: Enter the new total not to exceed the amount. Note, this should match the contract maximum indebtedness, if applicable**.**

Contingent Amount: If your agency requests an allowance for unforeseen additional expenses, then specify the amount of your requested increase and new NTE that represents the contingency allowance. This is over and above any quote.

DMP/ODPO Amount: Enter the total Direct Materials Purchase/Owner Direct Purchase Order amount for project.

Attachments: Name any attachments included as supplemental information to the PAF.

Using Agency/BU: This should be the requesting agency/requirement owner.

Concurrence: Electronic Signature

Title: Enter the title of person electronically signing form.

**Any fields where there is no data available, or no entry is required, either leave it blank or enter N/A. Any fields where there is known data, include for informational purposes. Any changes to an original award should contain the data that is being changed and any other relevant data required for JPAC review and approval.*

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Statement of Work (SOW) #XX

Submitted to:

SOW #XX- Software and Implementation Services for City of Jacksonville Grants Management

Contact: Nichole Pettway | (nichole.pettway@accenture.com)

Note: Negotiations with the City relating to this scope of work have previously occurred with Incapsulate LLC as the contractor. As a result of an acquisition, as of May 1, 2024, Incapsulate is integrated into Accenture LLP. All current contracts, including the multi-year contract between Miami-Dade County and Incapsulate LLC, are currently in the process of being transitioned to Accenture LLP. The personnel, solution, implementation plan, and rates remain consistent with the negotiations with Incapsulate LLC: going forward, all documentation and agreements will refer to Accenture LLP as the contractor.

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STATEMENT OF WORK XX

This Statement of Work ("SOW") is entered into as of the date last signed by a party ("SOW Effective Date") between the City of Jacksonville ("Client" or "City") and Accenture LLP ("Accenture" or "Contractor") under the Master Services Agreement, dated July 19, 2023, between Miami-Dade County and Incapsulate, LLC ("Incapsulate") entered into the Miami-Dade Customer Relationship Management Solution Contract No. RFP-01690 (the "Miami Contract") for the procurement of customer relationship management solution services as stated in the Miami Contract (the "Services").

Whereas, on November 21, 2023, Contractor acquired Incapsulate, and on May 1, 2024, Incapsulate transferred and assigned its rights and obligations to Contractor and Contractor assumed Incapsulate's rights and obligations, including the Miami Contract.

Whereas, the Client wants to engage Contractor to provide the Services by utilizing the Miami Contract, and Contractor wants to provide the Services to the City and has agreed to the use of the Miami Contract.

All undefined capitalized terms used in this SOW have the meanings defined in the MSA. If this SOW conflicts with the MSA, this SOW governs.

1.0 Background

Accenture will be configuring and implementing a Grants Management Solution, to meet the City of Jacksonville's Grants Management requirements to enable the City of Jacksonville to receive, review and approve Grants for grantees. Additionally, provide the availability to track and manage Grant contracts and related outcomes.

1.1 Term

The Term of the SOW will be for 16 weeks from the Effective Date.

2.0 Services

2.1 Scope of Services

This will be a firm Fixed Price Project and the Purchase Order from the City will be delivered after execution of the Agreement by both parties. The overall purpose of this project is to implement the Grants Management solution for the City of Jacksonville.

The implementation will include, in addition to ongoing project and program management the following activities:

1. Application Forms Configuration

- Configuration of two application forms:
  - Grant Application Form
  - Quarterly Programmatic Report

2. External Facing Web Portal

- Development of an external-facing web portal using standard Salesforce PSS (Public Sector Solutions) based components.

3. User Access Configuration

- Configuration of user access and permissions:
  - **Profiles:** Configure up to two (2) Profiles.
  - **Permission Sets:** Configure up to three (3) Permission Sets.
  - **Roles:** Configure up to three (3) Roles.

4. Email Communication

- Enable the ability to send and receive emails with Grantees directly from Salesforce.

5. Grant Management Workflows

- Configuration of workflows related to the grant lifecycle, including:
  - Application Submission
  - Review Process
  - Quarterly Programmatic Report
  - Scoring

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6. Reports and Dashboards

- Creation of up to four (4) Dashboards comprising a total of sixteen (16) reports to provide insights into grant management and other critical data.
- Configuration of up to ten (10) List Views to help users manage their workload efficiently.

7. Email Templates and Automation

- Configuration of up to five (5) Email Templates.
- Implementation of up to five (5) automated Email Workflows to streamline communication processes.

8. Data Validation

- Implementation of up to five (5) Validation Rules to ensure data integrity and cleanliness.

9. System Integrations

- Configuration of integrations with external systems: SharePoint

This scope ensures that the Salesforce implementation meets the needs of the grant management process, providing the necessary tools and functionalities to streamline operations, maintain data integrity, and enhance user experience.

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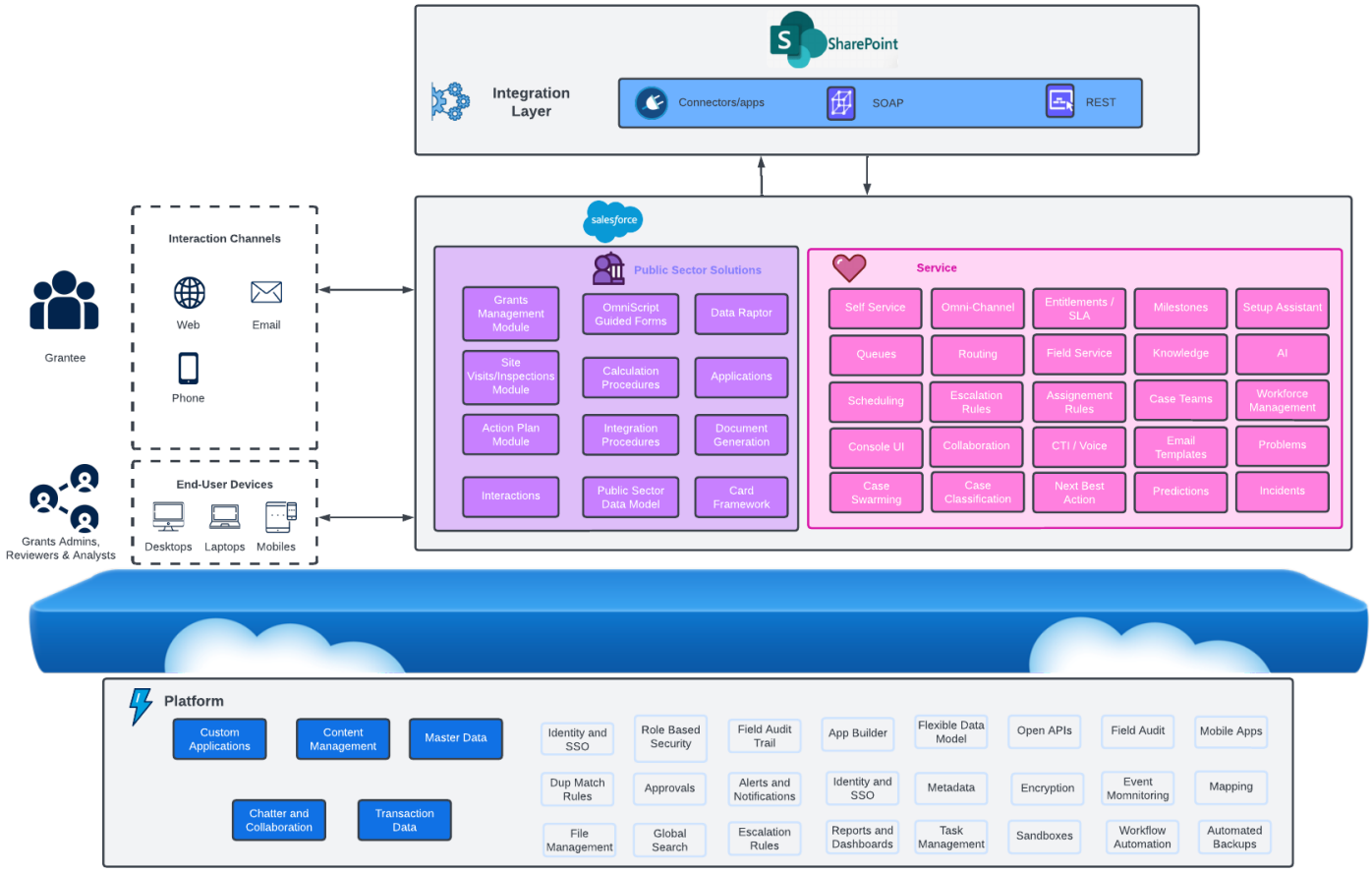

2.2 Solution Overview

Accenture's proposed solution and the Salesforce platform include the following industry-specific capabilities.
Salesforce Data Models - The proposed solution will leverage the standard Salesforce data model for the following functionality including but not limited to Contacts, Accounts, Users, and Tasks. The proposed solution leverages the Salesforce Public Sector Solutions (PSS) data model for the following system functionality including but not limited to Funding Programs, Funding Opportunities, Applications, Budgets and Visits. See Public Sector Solutions Admin Guide for Data Model Overview for Public Sector Solutions Standard Objects.
Salesforce Platform - The proposed Grants Management solution will leverage core Salesforce functionality for the following functionality including but not limited to Email Templates, Email Alerts, Flows, Queues, Assignment Rules, Files, Approval Processes, Record Types, Record Pages, standard permissions and User management. The Salesforce Lightning Console is a unifying experience for the Grants Management users allowing the organization to have a 360-degree view of each Grant Funding Programs, Grantees and Grants. Thus enabling personnel to manage the Grant Lifecycle from Application Intake to Grant Closure. A console is a type of Salesforce application that is designed specifically for how the City of Jacksonville wants their user desktop to look and contains key components related to Grant Funding Programs, Grantees, Grants and Performance metrics.
The Salesforce Console uses tab-based navigation creating a workspace suited for fast-paced work environments and increased productivity. Tabs help users quickly see all the information they need on one screen with easy navigation without losing context.
Salesforce Public Sector Solutions (PSS) - The proposed solution will leverage PSS functionality for the following functionality including but not limited to Grants Management, Public Portal, Omniscripts, and Business Rules Engine. Public Sector Solutions is built on Service Cloud and the Salesforce Platform and rapidly accelerates system development time to value as part of the system is pre-built with specific functions. PSS includes a pre-configured, specific data model and capabilities that provide a unified engagement platform that provides an end-to-end digital journey to strengthen relationships and build trust between the City and their grantees.

2.3 Implementation Technical Responsibility Matrix

The following table defines the roles and responsibilities for the City and Accenture.

Task	City Responsibility	Accenture Responsibility
Discovery & Configuration	• Business staff to provide details on requirements during discovery • Provide confirmation of Requirements Traceability Matrix	• Configure solution to requirements documented in the Requirements Traceability Matrix • Incorporate feedback from the City during configuration. • Deploy System to Production
User Acceptance Testing	• Provide staff to conduct UAT • Provide Acceptance • Prepare Test Cases and Test Scripts related to the Grants Management solution	• Accenture will provide an estimate of City staff time for UAT daily stand ups and tools to be used • Accenture will provide Requirements Traceability Matrix for the City to reference when developing test scripts and test cases. • Incorporate Feedback
Training	• Identify City staff for admin training • Access to City users • Training facility with computers and access to the internet	• Provide Administrator Training for up to 4 users with up to 2 sessions of 2 hours • Provide End User training for up to 4 sessions of 2 hours • Provide recordings of training
Documentation	• Access to SMEs • City Trainers will review Training recordings	• Training Recordings

2.4 Implementation Plan

Accenture will use our proven delivery approach to implement the Solution and help the City reach its Grants Management objectives. Our methodology is based on our experience implementing Salesforce for local governments across North America and draws from both Agile methodologies and Project Management Body of Knowledge (PMBOK) to apply a flexible yet rigorous approach.
The timely completion of a successful Grants Management Solution implementation requires consistent oversight across all project activities. Accenture's project management framework spans the PMBOK's knowledge areas, incorporating scope, schedule, and cost tracking; integrated resource and contract management; and an enterprise approach to risk and quality used across all of our Salesforce projects. Within this management framework, we integrate Agile methodologies where projects benefit from phased approaches to address changing priorities and requirements. To support Agile's closer integration of product owners and users into development, we use structured communication approaches to maintain momentum.

We leverage the Accenture configure first approach leading to saving cost, lowering risk during and after the implementation to maintain the solution. This approach enables accelerating delivery and adoption of a Salesforce solution. Our project methodology consists of the following project milestones:

- **Kick-off –** We work with the City of Jacksonville to define the project strategy and reach consensus on goals and objectives of the project.
- **Discover and Align –** We work with the City of Jacksonville to confirm project requirements and map to the capabilities of the Salesforce Public Sector Solutions built-in functionality.
- **Configure and Integrate –** Our solution is based on a "Configuration First" approach. We will analyze existing processes and align them to the functionality provided by Salesforce. We will identify gaps and provide configuration-based best of breed solutions.
- **Test and Train –** In the Testing step, both Accenture's testing team and the City's SMEs would be heavily involved in testing the configured solution. Additionally, Training will be completed from Accenture's proven Train-the-Trainer methodology for a successful launch of the solution.
- **Deploy and Go-Live –** As an installation, we promote and migrate completed configurations and system administration requirements from testing to production environments and prepare for a successful Go-live.

Implementation Schedule - Accenture proposes an Implementation Schedule and Proposed Project Plan for the proposed system to implement the Grants Management Solution that will support City objectives as shown in the figure below.

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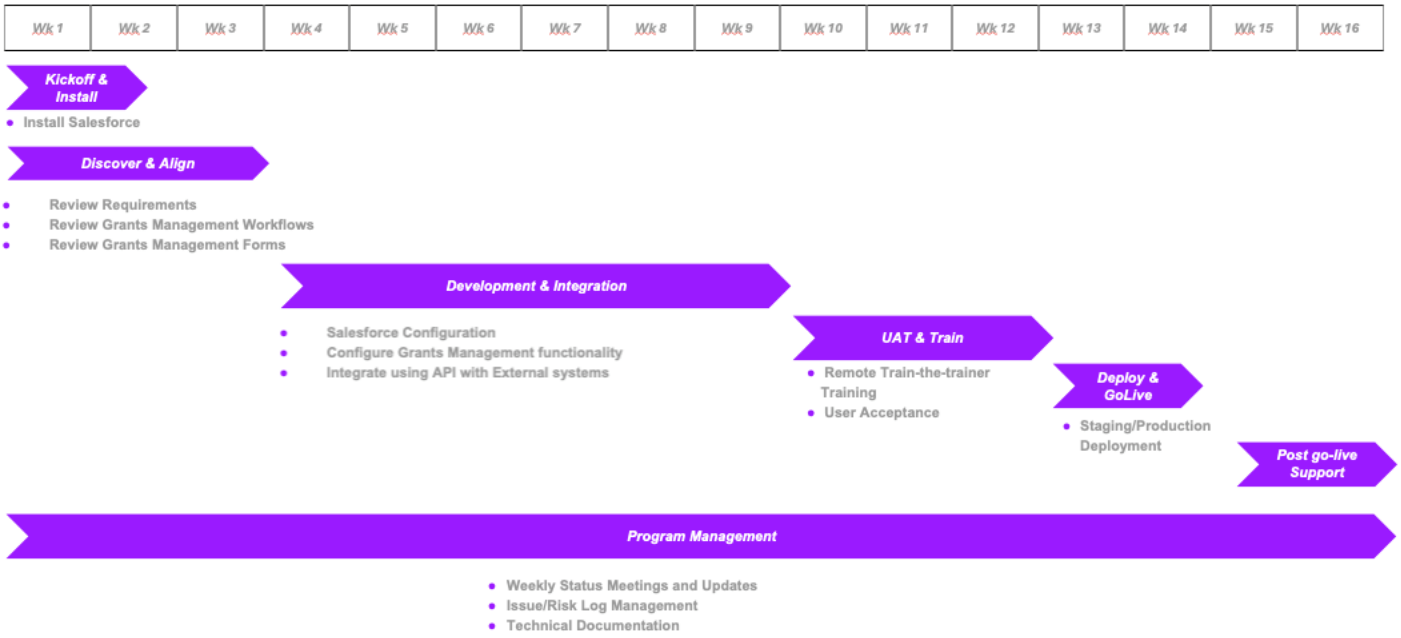

Accenture's proposed Implementation Plan and Project Plan.

This schedule will be finalized in consultation with the City at project start. Overall, we are proposing a 18-week schedule to implement functionality and train City of Jacksonville resources.

2.5 Proposed City Resource Plan and Project Activities

Role	Estimated Resources	Activities Performed	Availability
Project Executive Sponsor	**1**	• Project executive oversight • Decision maker for project issues	**Recommendation: 10%** of the time for the project duration
Project Manager	**1**	• Project Management • Status reporting • Coordination with Department • Decision maker for project issues	**Recommendation: 50%** of the time for the project duration
System Managers & business process SMEs	**3**	• Provide expertise on department processes or technologies • Provide expertise on department processes or technologies	**Recommendation: 25%** through discovery and alignment phase and as needed for the remainder of the project
City IT Staff	**2**	• Resolve security issues and validate compliance with IT standards • Coordination of API Integrations for in scope external systems including: SharePoint • Provide expertise on department processes or technologies	**Recommendation: 25%** As needed, throughout the project

The following Activities will be produced by Accenture and the Client ("**Project Team**") under this SOW.

Activities Performed	Description (detailed description including format)
Perform Project Kick-off and Deliver Project Schedule	Project Kick-off is performed by City and Accenture teams. Project Schedule is reviewed by both parties and finalized for project.
Complete Discovery and Receive confirmation of Requirements Traceability Matrix	Discovery sessions completed with the Requirements Traceability Matrix as an output. City of Jacksonville will provide confirmation.

Deliver Final Sprint Demo of Development Phase	Accenture team delivers final sprint demo at the end of Development Phase with City stakeholders in attendance.
User Acceptance Testing Complete with Sign-off	City of Jacksonville completes User Acceptance Testing and provides sign-off.
System Go-Live	System is live and users are activated in Production Environment by Accenture & City.

2.6 Project Meetings

This implementation will be coordinated through regular project management activities and reports, outlined in the table below. Meeting count assumes a 18-week delivery window; other extensions to timeline or requests for additional meetings may constitute a change in scope.

Activity	Cadence	Weeks	Assumptions
Project Status Report	Weekly	18	Weekly meetings to review project status, risks, action items and miscellaneous project needs.
Team Check-Ins	Ad Hoc	As needed	Meeting cadence will vary depending on project needs, scheduled at needed
SME Touchpoint	Ad Hoc	As needed	Hour-long sessions with technical experts to support client activity and strategy, scheduled as needed
Steering Committee	Monthly	5	Hour long session with City stakeholders. Preparation session between City and Accenture project teams to align on content and project status.

2.7 Governance Deliverables

Standard deliverables will be made available to project stakeholders through meetings and enshrined in a shared folder via Basecamp or similar application.

Deliverables	Cadence	Medium / Location
Project Schedule	Bi-Weekly	Meeting / Shared drive (Google or Microsoft)
Project Status Report	Weekly	Meeting (Weekly Status) / Email, shared drive (Google or Microsoft)
Risk Register	Weekly	Meeting (Weekly Status) / Shared drive (Google or Microsoft)
Issue Log	Weekly	Meeting (Weekly Status) / Shared drive (Google or Microsoft)

2.8 Change Request Process

Changes to the scope of this SOW will be handled through the change order process described in this Section. A written Change Request must be prepared by the City team. Once received, Accenture will evaluate and provide a written cost and schedule impact statement to the City team within ten (10) business days. If the authorized City team designee(s) approves the cost and schedule impact it will provide written notification to Accenture. Change Requests must be mutually agreed upon by the Parties and signed by authorized representatives from both Parties to authorize implementation of the changes. Until the Change Request is agreed in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

2.9 Acceptance Criteria

Only designated employees of the City team (or their authorized delegates) will provide acceptance of deliverables.

- The City will conduct UAT and provide acceptance for the system within five (5) business days of the UAT period completion.

System Acceptance

The following elements will need to be tested before the agreed upon date for UAT completion.

- System configuration as specified in the Requirements Traceability Matrix.

Deliverables will be deemed accepted if not rejected by City by providing written notice within five (5) business days after delivery specifically identifying the manner in which the Deliverables fail to materially comply with their applicable specification.

3.0 Pricing & Payment Terms

This will be a firm Fixed Price Project and the Purchase Order from the City will be delivered after execution of the Agreement by both parties. All fees and expenses will be paid USD via electronic ACH or Wire Transfer.

Accenture will invoice Client for performance of the Services as a fixed fee. Accenture's fees for the Services will be $561,496 , plus incurred expenses including travel, lodging, and all applicable taxes. Accenture will invoice as follows:

3.1 Summary Pricing

The Table below outlines the summary pricing for the project.

Category	Type	Price
One Time	Accenture Professional Services	$561,496.00
Total (One Time Costs)		**$561,496 .00**

3.2 Accenture - Payment Schedule

The table below provides a deliverable-based payment schedule:

Invoice Date	Milestone	Notes	Amount
Week 1	Project Kick-off	Perform Project Kick-off and Deliver Project Schedule	$150,000.00
Week 5	Discovery Phase Complete	Complete Discovery and Sign-off for Requirements Traceability Matrix	$100,000.00
Week 12	Development Phase Complete	Deliver Final Sprint Demo of Development Phase	$100,000.00
Week 14	User Acceptance Testing Phase Complete	User Acceptance Testing Complete with Sign-off	$100,000.00
Week 16	System Go Live	Users activated in Production Environment	$111,496.00
Total Accenture Professional Services			**$561,496.00**

4.0 Key Assumptions & Considerations

The following assumptions apply to this SOW. They are in addition to other assumptions found throughout this document.

- This proposed plan assumes Grants Management Solution implementation without any customization provided by the Accenture implementation team and Salesforce. Accenture will work with the City to adapt requirements to the existing out-of-the-box capabilities of Salesforce to help the project stay inside the agreed scope of work and fixed price costs. After completion of discovery and design Accenture may need to revise the scope of how the City will use the Salesforce Platform to complete requirements without custom development or increased costs.
- ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility.
- Salesforce storage limits apply unless otherwise indicated. The City can purchase additional cloud-based storage from Salesforce or other third-party cloud storage providers or use the City's existing storage solutions
- All Salesforce general, feature, storage and license limits apply. For more details please see: https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_gov_limits.htm

and https://help.salesforce.com/articleView?id=collab_files_size_limits.htm&type=5

- Configuration of Forms and email templates will be completed in English language only.
- All required Salesforce licenses will be purchased from Carahsoft and available for Accenture use at the project kick-off.
- Licenses and access to third party systems, SharePoint, will be available for Accenture use at the project kick-off.
- Platform security is provided by Salesforce. Relevant security plans and documentation to be provided by Salesforce. A public storage model will be considered for this phase of the implementation.

- Multi-Factor Authentication (MFA) and Single Sign-On (SSO) configuration on Salesforce environments have not been requested by the City. Accenture identifies this as a risk against information security breach and will continue to support, however, until such time, as part of the services being provided under the agreement, the City of Jacksonville understands the information security risk and agrees that Accenture shall not be liable for any claim, demand, cause of action, of any nature whatsoever, for any direct or indirect damages, arising out of a security incident as a result of this identified gap. If the City revisits this decision in the future, Accenture would be happy to work with the City to implement a Multi-Factor Authentication (MFA) and Single Sign-On (SSO) solution as quickly as possible.
    -
    - Training activities as described in this response require the involvement of City resources.
    - Additional work required due to delays caused by the City's team will be managed through a Change Request process.
    - Business Process Reengineering (BPR) is not included in our implementation scope.
    - Overall project schedule relies on adherence to the UAT period in Section 1.5. Delays could result in additional costs and will be escalated to the Project Executive Sponsor.
    - The City will designate an executive sponsor(s)/decision maker(s) who will sign off on each deliverable.
    - The email address to be used within Salesforce to send and receive emails will be supplied by the City. City must have access to the email address and change forwarding for that address.
    - Standard Objects will be used when possible, such as the Contacts object for Clients
    - File storage of attachments and documents will use standard Salesforce file storage methods.
    - Grants management subject matter experts and Tech Support Leads are available from City in a timely manner
    - Client must have admin access to the email address provided to allow emails to be sent to and from Salesforce.
    - Salesforce standard reporting and dashboards to be used for all reporting

5.0 Out of Scope Services

4.1 Data Migration

- Migration of data from existing Cyber Grants system is not in scope

4.2 System Integrations

- Configuration of integrations with below external systems is not in scope
- GIS (Geographic Information System)
- DocuSign – Connect and configure up to two workflows

4.3 Phase-2 Requirements

- Any requirements related to phase-2 of Grants Management are not in scope for this implementation

6.0 Period of Performance

The period of performance will be from the execution of this agreement through the agreement and project completion date. Client and Accenture may extend the Statement of Work with mutual agreement.

7.0 Place of Performance

Work will be performed both on-site at the Client's offices and off-site.

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8.0 Signature

This Statement of Work (SOW) may be signed in counterparts, each of which shall be deemed an original.

The Parties expressly agree that electronic signatures may be utilized for execution of this SOW. The Parties acknowledge and agree that (i) the issuance of an electronic signature shall be valid and enforceable as to the signing Party to the same extent as an inked original signature; and (ii) these documents shall constitute "original" documents when printed from electronic files and records established and maintained by either Party in the normal course of business.

IN WITNESS WHEREOF, the parties have caused this SOW to be executed by their duly authorized representatives as identified below and to be effective as of the SOW Effective Date written above.

AGREED AND ACCEPTED

Accenture LLP Signature:	**City of Jacksonville** Signature:
_____	_____
Name:	Name:
_____	_____
Title:	Title:
_____	_____
Date:	Date:
_____	_____

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16

SUBJECT: Piggyback Miami-Dade Customer Relationship Solution Contract No. RFP-01690 with Accenture, LLC.

BID #: PSC-0433-24 **OPEN DATE: N/A**

GENERAL GOVERNMENT AWARDS COMMITTEE

KIND AND BASIS OF CONTRACT: PIGGYBACK CONTRACT – JULY 19, 2023 – JULY 19, 2028

AGENCY: TECHNOLOGY SOLUTIONS

BASIS OF AWARD: PIGGYBACK CONTRACT

NUMBER OF BIDS INVITED: N/A **NUMBER RECEIVED**: N/A **OTHER**: N/A

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to Piggyback Miami-Dade Customer Relationship Solution Contact No. RFP-01690 with Accenture, LLC to complete three (3) separate projects with Salesforce in Phase-1 for three (3) different divisions of the City: MyJax 311, Office of Economic Development, and Jacksonville Human Rights Commission starting July 29, 2024. Period of service will be from date of executed contract through July 19, 2028. Estimated project expenditures are listed below. Total expenditure not-to-exceed $1,133,488.00.

MyJax 311 – Not to Exceed = $635,000.00
Office of Economic Development - Not to Exceed = $310,488.00
Jacksonville Human Rights Commission – Not to Exceed = $188,000.00

FUNDING SOURCE: from multiple sources, executed by formal contract through Office of General Counsel and process by purchase order(s).

ATTACHMENTS: Recommendation Memo, Risk Approval, Vendor Quote, Contract, RFP

ANALYST: Corey Sidlo **RESPECTFULLY SUBMITTED** DUSTIN FREEMAN, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Wanyonyi Kendrick, Director of Technology Solutions

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF GGAC COMMITTEE ON RECOMMENDATIONS ABOVE
MEMBERS APPROVING 3 MEMBERS DISAPPROVING 0 DATE: 6/27/2024
OTHER:

ACTION OF AWARDING AUTHORITY DATE 7/1/2024

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION Karen Bowling
Karen Bowling
Chief Administrative Officer
For: Mayor Donna Deegan
Under Authority Of:
Executive Order No: 2023-02

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TECHNOLOGY SOLUTIONS

A NEW DAY

MEMORANDUM

TO: Dustin L. Freeman, Chief of Procurement Division

THROUGH: Wanyonyi Kendrick, Director of Technology Solutions Wanyonyi Kendrick Digitally signed by Wanyonyi Kendrick Date: 2024.06.21 09:10:49 -04'00'

FROM: Jonathan Jordan, PMO Manager

SUBJECT: **Piggyback Miami-Dade Customer Relationship Management Solution Contract No. RFP-01690 with Accenture, previously Incapsulate, for Salesforce implementation and related services.**

DATE: June 18, 2024

The Technology Solutions requests approval to piggyback Miami-Dade Customer Relationship Management Solution Contract No. RFP-01690, with Accenture LLC, formerly Incapsulate LLC. The contract term period is July 19, 2023, through July 19, 2028. Miami-Dade County competitively procured and awarded the RFP resulting in the referenced contract.

The City of Jacksonville will complete three (3) separate projects with Salesforce in Phase-1 for three (3) different divisions of the city: MyJax 311, Office of Economic Development, and Jacksonville Human Rights Commission. The three quotes attached reflect the three (3) different implementation projects. These projects will kick off after July 29, 2024.

The requested amount not-to-exceed $635,000.00 – MyJax 311
The requested amount not-to-exceed $310,488.00 – Office of Economic Development
The requested amount not-to-exceed $188,000.00 – Jacksonville Human Rights Commission

The requested total expenditure is not-to-exceed $1,133,488.00

Funding Sources: Multiple funding sources Tracy Geake Digitally signed by Tracy Geake Date: 2024.06.21 08:18:30 -04'00'

Upon award approval, a request for a formal contract will be made through the Office of General Counsel.
Attachments: Contract & RFP of Miami-Dade, Accenture Quotes, Certificate of Insurance

cc: Thomas Ossi, Technology Contract and Records Manager
Jarrell Robinson, Asst. Project Manager
Ruben Ola, Contract Compliance Analyst
Nihal Kekec, Contract Administrator

rbo0624

TECHNOLOGY SOLUTIONS
214 N. Hogan St. 9th Floor Jacksonville, FL 32202
Phone: 904-255-8000 Fax: 904-232-6932

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 06/21/2024

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

PRODUCER
MARSH USA LLC.
155 N WACKER, SUITE 1200
CHICAGO, IL 60661

CONTACT NAME: Marsh | U.S. Operations
PHONE (A/C, No, Ext): 866-966-4664 FAX (A/C, No): 212-948-0770
E-MAIL ADDRESS: Chicago CertRequest@marsh.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Zurich American Insurance Company	16535
INSURER B : N/A	N/A
INSURER C : American Zurich Insurance Company	40142
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Accenture LLP
500 W Madison St,
Chicago, IL 60661

COVERAGES **CERTIFICATE NUMBER:** CHI-010701581-01 **REVISION NUMBER:** 3

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY			GLO 9376192-20	11/15/2023	11/15/2024	EACH OCCURRENCE	$ 2,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 300,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 4,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 4,000,000
	OTHER:							$
A	AUTOMOBILE LIABILITY			BAP 9376191-20	11/15/2023	11/15/2024	COMBINED SINGLE LIMIT (Ea accident)	$ 5,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB / OCCUR						EACH OCCURRENCE	$
	EXCESS LIAB / CLAIMS-MADE						AGGREGATE	$
	DED / RETENTION $							$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			WC 9299262-23 (AOS)	01/01/2024	01/01/2025	X PER STATUTE / OTH-ER	
A	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBEREXCLUDED? Y / N: N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		WC 9299263-23 (MA, NM & WI)	01/01/2024	01/01/2025	E.L. EACH ACCIDENT	$ 5,000,000
							E.L. DISEASE - EA EMPLOYEE	$ 5,000,000
							E.L. DISEASE - POLICY LIMIT	$ 5,000,000
A	CRIME			FID 9515896 03	06/01/2024	06/01/2025	PER LOSS	1,000,000
							AGGREGATE	1,000,000

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

CERTIFICATE HOLDER

City of Jacksonville
117 W Duval Street Suite 335,
Jacksonville, FL 32202

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Marsh USA LLC

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AGENCY CUSTOMER ID: CN101873351
LOC #: Chicago

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ADDITIONAL REMARKS SCHEDULE

AGENCY		NAMED INSURED
MARSH USA LLC.		Accenture LLP 500 W Madison St, Chicago, IL 60661
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

The Crime policy evidenced above is subject to deductibles for specific perils per policy terms and conditions.

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Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See *Specific Instructions* on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

ACCENTURE LLP

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☑ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

1255 TREAT BLVD., SUITE 250

Requester's name and address (optional)

6 City, state, and ZIP code

WALNUT CREEK, CA 94597

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number

7 2 – 0 5 4 2 9 0 4

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** **Date** 4/17/2024

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

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incapsulate
Part of Accenture

VIA EMAIL

June 18, 2024

City of Jacksonville

Attn: Wanyonyi Kendrick; wkendrick@coj.net

Subject: Change in Control

Reference: Customer Relationship Management Solution Contract No. RFP-01960 by and between Miami-Dade County, Florida and Incapsulate LLC dated July 19, 2023 and all amendments, exhibits, schedules, task orders, and/or statements of work associated therewith (collectively, the "Agreement")

Dear Ms. Kendrick,

As you may know, Accenture ("Accenture") acquired Incapsulate LLC on 21 November 2023, (the "Transaction").

As a result of the Transaction, and as part of an internal reorganization to effectively integrate the Incapsulate LLC business into Accenture's operations (the "Operational Reorganization"), Accenture intends to cause Incapsulate to transfer and assign its assets to Accenture LLP, an Illinois Limited Partnership and the primary U.S. operating entity of the Accenture group of companies. Upon such intracompany transfer, Accenture LLP will assume, perform and discharge in due course the future obligations under the Agreement. Such assignment was made effective as of 1 May 2024.

If you have any questions regarding the Transaction, please contact me at your convenience. We are excited about our future as part of Accenture and the opportunity to continue working with you.

Very truly yours,

INCAPSULATE LLC

By (signature): DocuSigned by: Ryan Powell 3636E0C04E374E4...
Name (printed): Ryan O. Powell
Title: Managing Director

ACCENTURE LLP

By (signature): DocuSigned by: Jonathan Light 7804702704D94CC...
Name (printed): Jonathan Light
Title: Managing Director

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Statement of Work (SOW)

Submitted to:

Software and Implementation Services for a Customer Relationship Management (CRM) Solution

Contact: Nichole Pettway | (nichole.pettway@accenture.com)

This Statement of Work is made part of the Professional Services Agreement (hereinafter "Agreement" entered into this 29th day of July, 2024 ("Effective Date") by and between Accenture LLP (hereinafter "Accenture" or "Contractor"), a company, with its place of business at 500 W Madison St, Chicago, IL and the City of Jacksonville, FL (hereinafter "Jacksonville" or "City" or "Client"), with its place of business at XXXXX, Jacksonville, Florida.

Commented [1]: City needs to provide this information

Note: Negotiations with the City relating to this scope of work have previously occurred with Incapsulate LLC as the contractor. As a result of an acquisition, as of May 1, 2024, Incapsulate is integrated into Accenture LLP. All current contracts, including the multi-year contract between Miami-Dade County and Incapsulate LLC, are currently in the process of being transitioned to Accenture LLP. The personnel, solution, implementation plan, and rates remain consistent with the negotiations with Incapsulate LLC: going forward, all documentation and agreements will refer to Accenture LLP as the contractor.

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1.0 Background

Accenture will be configuring and implementing our proprietary CRM Capsule[1] off-the-shelf solution to meet the City of Jacksonville's requirements for the Software and Implementation Services for the Customer Relationship Management (CRM) Solution to be used by the City's MyJax Customer Service Team and Departments.

2.0 Scope of Services

This will be a Firm Fixed Price Project and the Purchase Order from the City will be delivered after execution of the Agreement by both parties. The overall purpose of this project is to provide and implement an enterprise-wide, CRM solution for the City using the Salesforce platform and the Incapsulate CRM Capsule.

The implementation will include, in addition to ongoing project and program management the following activities:

- Configuration of up to 50 SR types (1 standard activity with 3 standard outcomes per SR type) for this project, all remaining SR types can be configured jointly by the City Admin team with support as required by Accenture after the final determination is made after the discovery phase of how many final SR types will be needed for GoLive. **Please Note:** The CRM Capsule subscription pricing will allow the City to configure SR types for all City departments.
- Publish up to 25 Knowledge articles and content in the Salesforce knowledge base, all remaining knowledge content can be configured and integrated with the CRM Capsule as authored jointly by the City KM Admin team using Salesforce Knowledge.
- Build up to 10 Reports and 5 Dashboards specific to the City's requirements using standard Salesforce out-of-the-box reporting capabilities. These are in addition to the standard reports that come included with the CRM Capsule and Salesforce CRM solution.
- Implement the CRM Capsule Web Portal and Mobile App for citizen self-service use. Accenture will work with the City's web team to incorporate links to the CRM Capsule web portal with the City Website and coordinate color schemes and branding based on the configuration of the Capsule portal and mobile apps as designed.
- Accenture Mobile Worker App (up to 30 users - requires two dedicated Public Sector Foundation licenses (that have been included in the proposed Salesforce licenses) will be reserved for the Mobile Worker App assignment as outlined in detail in **Section 3.0**.
- After the City obtains the Salesforce licenses as required for the project to begin, Accenture will set up Salesforce CRM environments for this project called sandboxes that could include but not limited to: Dev, QA, QATraining, HotfixDev, and a fresh Production org will be used for CRM implementation.
- Multi-language is a feature of the public facing web portal and for the Citizen Mobile App only. The city will provide the translation for all the service types.
- Administration training of up to 8 users will be provided (typically 3-6 sessions of 2-4 hours each for a total of up to 20 hours) to the City's designated super users and administrators on CRM SR Configuration, Reporting, User Administration, and Knowledge Administration.
- We will provide 5 sessions of 4 hours each of Train-the-Trainer sessions for a total of 20 hours by an Accenture trainer to train City staff who will then train end-users. Accenture will train up to 3 City Trainers.
- Accenture will support the City's End User Training by attending and assisting with the first two End User Training sessions.
- Data migration of legacy CRM records for contacts, accounts, and service requests.

[1] Please note that the subscription agreement for the proprietary CRM Capsule is branded with the Incapsulate name. Incapsulate is now part of Accenture.

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2.1 Key Capabilities

The table below provides an overview of key CRM Capsule capabilities. Please see the CRM Capsule Solution Overview document for the complete description of CRM Capabilities.

Feature	Description
Service Request Functionality	The design of our CRM Capsule Agent Console is aimed at simplicity and using context to present appropriate information to the agent at the right time. Key features include: • One universal search box for streamlined access to the service request, knowledge, or location-based information • Multiple search strategies and options to locate information and services • Agent guidance begins to capture the details of an interaction that could be used to answer a question or lead to the creation of a service request • Selection of a service request type leads to additional questions and information displayed to prompt the agent and guide the process to capture the required information • When the agent saves the request, a case or SR number is automatically generated, and it is routed to the queue of the department responsible, and this begins the resolution processes and activities
Citizen Facing Self-Service Functionality	• The CRM Capsule includes very comprehensive self-service capabilities that allow the City to choose what self-service channels to provide to its citizens. The CRM Capsule includes self-service functionality for: • Self Service Web Portal • Self Service Mobile App • Chat and Chatbots
Configuration and Workflow Functionality	The CRM Capsule provides a Service Request Management console which is designed to intuitively manage and maintain Cases/Service Requests and the resolution activities of the City staff who complete the service response. The process tracks and provides multiple measures and metrics around the time to resolve the issue, all activities and timelines of the service actions, and overall time to resolution. The CRM Capsule makes it easy for the Department staff to monitor the service request from creation to resolution with key features for Service Request Management such as: • Streamlined configuration for cases or service requests, Flex Note Questions, Activities and Outcomes • Support for automated workflows to transfer and reallocate cases to the appropriate departments and queues • Configuration and monitoring of SLAs at the Case/Service Request and Activity level • Configuration of duplication detection logic based on location, radius, calendar days • Scheduling of bulk collections based on work schedules, location, and capacity. • Automated event-based email notifications • Configuration and management of escalations and assignments using workflow rules
Knowledge Base Functionality	A critical part of a great local government 311 CRM solution is the use of a knowledge management system to capture, manage, search and display the key information related to current events; answers to frequently asked questions; City policy and procedures; and location-based information about City services, functions, facilities, and activities. The Capsule Agent Console blends knowledge base information with service request types to provide agents with quick access to the information most used and needed to answer citizen inquiries efficiently and accurately. Our knowledge management system includes these key features: • A private and public knowledge base. • A knowledge encyclopedia • Intuitive browsing and searching • Administration • Workflow to support specific workflow rules and automated knowledge-base management. • Multilingual Articles • Suggested Articles • Knowledge ratings • FAQ searchable list of frequently asked questions

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Report and Query Functionality	The CRM Capsule solution includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Salesforce reports can use the tabular, summary, matrix, or joined format: • Tabular reports are the simplest and fastest way to look at data. • Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. • Matrix reports are similar to summary reports but allow users to group and summarize data by both rows and columns. **Dashboards** - A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, or metrics. They provide a snapshot of key metrics and performance indicators for your organization. **Analytic Snapshots** - An analytic snapshot lets you report on historical data.
Geographic Information System (GIS) Integration Functionality	The CRM Capsule integrates with ESRI GIS out-of-the-box, and we have proposed this for the City as to help confirm and validate locations when creating new cases or service requests. We can consume the City ESRI layers, topography, reverse geocoding, and assets. Our CRM Capsule will also route Service Requests to the correct District queue based on geolocation and schedule. The GIS-integration features of the CRM Capsule also allow the CRM to make use of available ESRI data and layers to help agents to: • Enter partial addresses and pick the correct address from an auto-filtered list • Select blocks or intersections • Use common names to identify landmarks • Select locations on a GIS map • Utilize existing mapping layers • Visualize the location of each Service Request • Analyze and identify duplicate or similar Service Requests in a predefined geographic area
Mobile Capabilities	The CRM Capsule includes very comprehensive mobile capabilities for both the citizens and the City staff. The CRM Capsule provides a Self-Service Integrated public-facing self-service application for web and mobile to allow citizens to create service requests, monitor progress and resolution of their requests, and search and view a public-facing knowledge base with information and FAQs. • CRM Capsule Citizen Mobile App - The Citizen Mobile app for citizen use is part of the Self-Service capabilities of the CRM Capsule that provide a unified customer experience for citizens across both the web and mobile channels with a single configuration. The CRM Capsule includes self-service mobile apps for Android and iOS, which utilize the existing service request configurations done by CRM administration staff for each type of service request. • Mobile Worker App - For City staff, the CRM Capsule Mobile Worker app for Android and iOS is designed for use with the CRM Capsule for City staff users with mobile devices. In addition to providing City mobile workers with allof the functionality that the Citizen Mobile app has to create and view existing service requests, the Mobile Worker app provides City staff with the ability to update and complete service requests and activities in the field.
Integration Functionality	Connecting our proposed Capsule solution to existing enterprise applications is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms. Our solution provides the following capabilities: • Integration to the City ESRI/ArcGIS (included in our cost for this project) • Integration to the City's telephony systems using the Salesforce Connects CTI app for Cisco (Harmony is used currently) • Integration to Twilio for SMS notifications • The ability to call out to virtually all common APIs, to enable synchronization, push/pull, and mashups with external apps/systems. • An Enhanced Open311 Compliant API that leverages the Open CRM standard, a standardized protocol for location-based collaborative issue-tracking, to provide a secure API to core CRM services. • Standardized integrations between a common legacy system and Salesforce using Open311 APIs.

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	• Additional levels of security through the establishment of unique public or private API keys. • Management of and reporting on integrations by source.
Administration	Service Request Configuration Management - Using the Capsule's SR Configuration Console, the City Administrators can easily configure each service request type details section to configure a broad set of data elements. Using the Configuration Console, administrators have a GUI interface to view all details of a service request type, versions, and related information for all script questions, rules, settings, activities, outcomes, and information

2.2 Project Tasks/Deliverables

The following table describes the project activities, associated outcomes/deliverables, and owner. These deliverables follow the Acceptance Criteria outlined in **Section 2.9**

Activity	Description	Outcome / Deliverable
Install CRM Capsule and enable purchased Salesforce licenses	After Salesforce provides the credentials for the provisioned cloud CRM environments, Accenture installs the CRM Capsule. To the extent the City has identified System Administrator resources at this point, Accenture will work with those resources to facilitate knowledge transfer and training. *Key Assumptions (if applicable)* • All necessary Salesforce licenses available at project start, with additional Salesforce licenses for users available by GoLive • City completes project implementation workbook	• CRM solution ready for use and configuration • City Project Pre-Implementation Workbook
Discovery & Alignment Sessions	Accenture works with the City to refine the implementation schedule, identify key stakeholders and points of contact, and finalize key functional and technical objectives. The team then jointly identifies key SR types and KB Articles for initial focus of the project for each department and works to align requirements with CRM Capsule functionality. This will result in a Requirements Traceability Matrix (RTM) that will be used to inform work going forward. Also, at this point, the project plan will be finalized based on joint review with the City. *Key Assumptions* • City makes available key stakeholders and domain subject matter experts throughout the discovery & alignment process • Data migration strategy and planning will document records to be migrated and all assumptions	• Project Plan • User Stories • Requirements Traceability Matrix • Data Migration Plan • City Department Implementation Strategic plan (City)
Populate Service Request (SR) Templates	• The City populates CRM Capsule Configuration Service Request templates based on existing Service Requests. Templates capture intake questions and business rules (e.g., workflow, escalation.) • Key Assumptions • the City populates CRM Capsule Configuration Service Request templates • Accenture provides review and validation prior to loading templates • Up to 50 Service Request types will be configured by Accenture	• Populated SR Configuration Templates (City) • SR Configuration Tracking
Configure Service Requests and KBs	Based on templates as populated by the City, Accenture loads Service Requests and Knowledge Articles into the CRM Capsule. This is done in an Agile manner, with incremental batches of Service Requests being loaded and reviewed on an ongoing basis. Any lessons learned in	• Configured SRs in CRM • One Knowledge article template to create up to 25 Knowledge Articles

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	configuring the initial Service Requests will be incorporated into subsequent efforts. *Key Assumptions* • the City provides all Knowledge Content for use by 311 agents	• Authored Knowledge Articles (City)
Configure Integrations for GIS Services, Telephony, Web Portal, Citizen Mobile App, Chat and Chatbots	The City makes ESRI GIS services available to CRM at project kickoff. Accenture subsequently integrates location and mapping services into CRM Capsule. The City integrates the Customer self-service web portal into the City website. Accenture will provide the needed urls to the City team. Accenture will implement the CRM Capsule Citizen Mobile App. Accenture links constituent facing Knowledge base to the CRM Capsule Public Web Portal. Accenture enables the CTI integration app exchange product to the City's Cisco telephony system with IVR. Accenture enables the Chat and Chatbot features on the CRM Capsule Public Web Portal and/or Citizen Mobile App. Accenture will provide the Open311 API to the City to two-way integration with City Middleware for Department systems (Cartegraph, Tivoli, JaxEpic, Traffic, ERAT, Chameleon, FieldSeeker, PICS) *Key Assumptions* • City makes available ESRI GIS services (ArcGIS version 10.x or higher) • City responsible for resolving related security and access issues • City has (or obtains) all necessary 3rd-party licenses including the CTI Bucher+Suter Cisco Salesforce Connects app • City is responsible for configuring City's middleware for consuming Open311 API • Provide access to GIS Team and all GIS services should be either be publicly accessible or authenticated • There must be one Composite Locator Service containing the necessary locators	• City ESRI GIS integrated with CRM • Location validation services established • Enhanced Open311 API to CRM Capsule Web Portal and Citizen Mobile App • API Interface to City Middleware and department systems • CTI integration to the CRM
Configure Reports and Dashboards	Accenture will review out-of-the box CRM reports and dashboards with the City Both Accenture and the City will review edits and options on CRM reports Both Accenture and the City will determine dashboard contents *Key Assumptions* • Accenture will build 10 Reports and 5 Dashboards specific to the City's requirements using standard Salesforce out-of-the-box reporting capabilities. These are in addition to the standard reports that come included with the CRM Capsule and Salesforce CRM solution.	• Reports are enabled in CRM • City Dashboards enabled in CRM
Configure User Profiles and Roles	Accenture team configures user profiles and roles based on identification and classification of Call Center and Department users by the City. Typically, we configure up to 5 User Profiles. *Key Assumptions* • City will provide Accenture with user roles and privileges information.	• City user profiles loaded • City CRM roles assigned to users

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	• Accenture will provide examples of user profiles used on past CRM projects to the City • City will establish a map for MyJax and Department/Third Party vendor role and profiles	
Data Migration	City prepares legacy CRM contacts and service requests for data migration using the data migration strategy and plan as shown in the 2.3 Technical Responsibility Matrix Accenture migrates clean data to the CRM sandbox using the data migration strategy and plan as shown in the 2.3 Technical Responsibility Matrix	• Legacy Data prepared by the City • Loaded legacy contacts and service requests in the new CRM
Systems Administrator Training	Accenture trains CRM administrators on CRM Capsule and Salesforce admin topics. Accenture will provide up to 20 hours (typically 3-6 sessions of 2-4 hours each). Training may be in-person and/or remote (via video conference). Further details on training are provided below. *Key Assumptions* • Up to 20 hours of training sessions provided • Training will be recorded	• City CRM administrators and super-users trained
User Acceptance Testing	Accenture prepares user stories for acceptance and validation. The City reviews user stories for acceptance and verifies solution functionality based on user stories.	• City accepts CRM is configured properly for City processes
End User Training	City identifies CRM end-user trainers in the call center and departments. Accenture trains the City Trainer who will then train all City call center and department end users *Key Assumptions* • Up to 20 hours of training sessions provided • Training will be recorded	• Trained City call center and department staff end users are trained and ready to use the system
Staging and Production Deployment (Go Live)	Accenture will ready the production environment City will implement the Go Live and Deployment plan according to schedule Accenture will support Go Live onsite with City team	• CRM Production environment is ready • GoLive date scheduled • Support plan enabled

2.3 Technical Responsibility Matrix

The following table defines the roles and responsibilities for the City and Accenture.

Task	City Responsibility	Accenture Responsibility
Service Request Configuration	• Provide business staff to help complete Accenture provided templates and workbooks • Provide CRM users to conduct UAT • Provide Acceptance	• Configure up to 50 SR types • Incorporate feedback from the City during configuration. • Deploy System to Production
Knowledge Base Configuration	• Provide business staff to help author knowledge base content • articles in addition to the 25 authored by Accenture as needed • Provide CRM users to conduct UAT • Provide Acceptance	• Publish up to 25 Knowledge articles and content • Incorporate Feedback • Deploy System to Production

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Task	City Responsibility	Accenture Responsibility
Public-Facing Web Portal and Mobile App Configuration	• Provide admin access to City's Apple App Store and Android stores for mobile app registration and launch • City publishes the link to the Public Facing Web Portal on City Website • Provide CRM users to conduct UAT • Provide Acceptance • Provide look and feel branding specifications	• • Submit Mobile App to App Store and Android Stores • • Accenture provides Public Facing Web Portal Link
User Acceptance Testing	• Provide staff to conduct UAT • Provide Acceptance • Prepare Department related Test Cases and Test Scripts • Confirm City look and feel branding	• Accenture will provide an estimate of City staff time for UAT daily stand ups and tools to be used • Accenture will provide completed SR Templates that will serve as the model for the testing Scripts. • Configure dashboards and reports as proposed • Incorporate Feedback
Configure CRM Standard Report and Dashboards	• Review out-of-the box CRM reports and dashboards • Review edits and options on CRM reports • Determine dashboard contents • Provide staff to conduct UAT • Provide Acceptance	• Review out-of-the box CRM reports and dashboards with the City • Review edits and options on CRM reports • Build 10 Reports and 5 Dashboards specific to the City's requirements using standard Salesforce out-of-the-box reporting capabilities. •
Integration Strategy (ESRI GIS and City Departmental Systems)	• Provide access to GIS Team and all GIS services should be either be publicly accessible or authenticated • There must be one Composite Locator Service containing the necessary locators • City Technical Team integrates City Middleware/Department systems to CRM using Open311 API	• • Configure CRM Capsule ESRI Connector • Consults and provides technical support on the Open311 API for the City's Integration to Department systems. • Configure Chat and Chatbots for use on self service apps •
Training	• Identify City staff for admin training • Access to City trainers • Training facility with computers and access to the internet	• Provide Administrator Training for up to 8 users on SR Configuration • Provide Train-the-Trainer up to 20 hours • Provide recordings of training
Data Migration (DM)	• User Migration and creation in SF environment • Define criteria for individual table & data records that have to be imported.	• Identify format of data migration templates for legacy SRs • Provide data migration strategy and approach • Provide table structures for Staging Database

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Task	City Responsibility	Accenture Responsibility
	• Complete Data migration templates provided by Accenture • Provide data mapping between input and CRM Capsule system necessary for the Data Migration activity • Provide Staging Database environment with Accenture identified table structure. • Prepare clean set of legacy data for data migration in Staging database after data integrity feedback from Accenture • Populate the input tables (within Staging database) with the clean data • Provide approval if bulk cleaning is more appropriate • Review sample data loaded in the Data Migration sandbox and provide approval. • Review and approve Data load in Production	• Provide consulting services to identify best practices for consolidating Service Request data from legacy system to CRM Capsule • Finalize the Data Migration plan based on the data and sources identified to be migrated • Create an Accenture User ID for Data Migration purpose with full access if necessary • Provide Solution data model with the fields and objects (tables) to enable mapping • Provide the data cleanup guidelines based on Solution requirements and functional recommendations. • Review cleaned data up to 2 rounds • Develop Data Migration schedule and cadence based on Data Migration templates completed by city • Load data with Pentaho application • Load data to Data Migration sandbox for review and feedback. Up to 2 rounds of feedback and mapping updates. • Load clean legacy data provided by City to Production environment •
Documentation	• Access to SMEs • CRM user list • GIS Documentation • Pre-Implementation Workbook • Completed SR type templates and workbooks • City Trainers will review Training documentation and recordings	• Accenture will provide the following documentation: • SR Configuration Guide • Enhanced Open CRM API • Capsule Data Dictionary • Training Template documentation

2.4 Implementation Plan

Accenture will use our proven CRM Capsule delivery approach to implement our CRM Capsule solution and help the City reach its service objectives. Our methodology is based on our experience implementing CRM solutions for local governments across North America and draws from both Agile methodologies and PMBOK to apply a flexible yet rigorous approach.

The timely completion of a successful CRM implementation requires consistent oversight across all project activities. Accenture's project management framework spans the PMBOK's knowledge areas, incorporating scope, schedule, and cost tracking; integrated resource and contract management; and an enterprise approach to risk and quality used across all of our Salesforce projects. Within this management framework, we integrate Agile methodologies where projects benefit from phased approaches to address changing priorities and requirements. To support Agile's closer integration of product owners and users into development, we use structured communication approaches to maintain momentum.

Instead of a design-and-build approach, we leverage our Capsule to install and configure— saving time and cost, lowering risk, and accelerating delivery and clearance of CRM project milestones. Our project methodology consists of the following steps:

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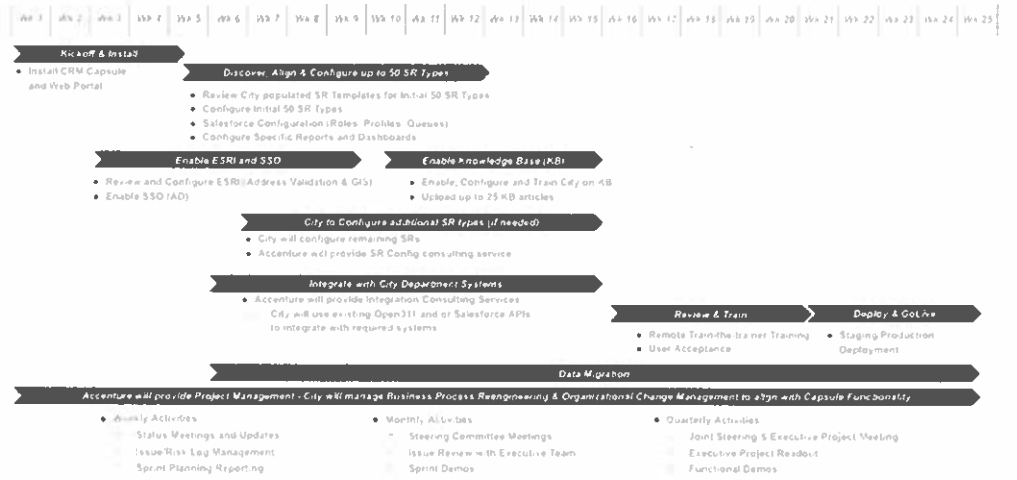
- **Kickoff and Install** – We install the solution early in the project to maximize team effectiveness, providing the CRM solution early in the project.
- **Discover and Align** – We work with the City to confirm project requirements and map to the capabilities of our CRM Capsule's built-in functionality. The data migration strategy is defined with City input as well.
- **Configure and Integrate** – We immediately begin documenting service request types for configuration and identifying required knowledge articles and configure these in the CRM for review and trial with the initial Department and key users. This implementation requires only configuration based on City service request types, resulting in the City's rapid move to phased testing and use of the Accenture solution
- **Review and Train** – This "out-of-the-box" configuration approach speeds time-to-results so that the City begins using the system early on in the project, confirming that processes are correctly implemented and are working as designed
- **Deploy and Go-Live** – As an installation, we promote and migrate completed configurations and system administration requirements from testing to production environments, train users, and prepare for a successful Go-live.

Implementation Schedule - Accenture proposes an Implementation Schedule and Proposed Project Plan for the proposed system to implement the CRM Capsule solution that will support City objectives as shown in the figure below.

Schedule Jacksonville CRM | Implementation Proposed Project Plan



Accenture's proposed Implementation Plan and Project Plan.

This schedule will be finalized in consultation with the City post-award. Overall, we are proposing twenty-five (25) weeks schedule to implement functionality and train City resources as outlined in our response. We are adding two weeks for flexibility to the schedule for unplanned events. Our proposed schedule of tasks and activities are described in more detail in **Section 2.2**.

Our tried-and-true approach to successful CRM projects is a great match with the City project objectives and expected outcomes, so we believe very strongly that our proven approach will meet the needs of the City to deliver a successful project and implementation of a new CRM system.

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2.5 Proposed City Resource Plan and Project Deliverables

Role	Estimate	Activities Performed	Availability
Project Executive Sponsor	1	• Project executive oversight • Decision maker for project issues •	**Recommendation: 10%** of the time for the project duration
Project Manager	1	• Project Management • Status reporting • Coordination with Department • Decision maker for project issues	**Recommendation: 50%** of the time for the project duration
System Managers & business process SMEs	**1 Per System**	• Provide expertise on department processes or technologies • Provide expertise on department processes or technologies • Populate Service Request Templates that will be used for SR configuration in the system. •	**Recommendation: 25%** through discovery and alignment phase and as needed for the remainder of the project
Department IT Staff	4-9	• Resolve security issues and validate compliance with IT standards Coordinate API • Integrations with existing systems • Configure service requests once trained on templates • Provide expertise on department processes or technologies	**Recommendation: 25%** As needed, throughout the project

2.6 Project Meetings

This implementation will be coordinated through regular activities and reports, outlined in the table below. Meeting count assumes a twenty-three week delivery window allowing for up to four additional weeks for flexibility, other extensions to timeline or requests for additional meetings may constitute a change in scope.

Activity	Cadence	Approx Count	Assumptions
Project Status Report	Weekly	23	
Team Check-Ins	Ad Hoc	23	Meeting cadence will vary depending on project needs, scheduled at needed
SME Touchpoint	Ad Hoc	10	Hour-long sessions with technical experts to support client activity and strategy, scheduled at needed
Executive Steering Committee	Monthly	12	Hour long session with Executive stakeholders. Preparation session between City and Accenture project teams to align on content and project status.

2.7 Governance Deliverables

Standard deliverables will be made available to project stakeholders through meetings and enshrined in a shared folder via Basecamp.

Name	Cadence	Medium / Location
Project Schedule	Bi-Weekly	Shared Google Drive
Project Status Report	Weekly	Email, Shared Google Drive
Risk Register	Weekly	Shared Google Drive

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Issue Log	Weekly	Shared Google Drive

2.8 Change Request Process

Changes to the scope of this SOW will be handled through the change order process described in this Section. A written Change Request must be prepared by the City team. Once received, Accenture will evaluate and provide a written cost and schedule impact statement to the City team within ten (10) business days. If the authorized City team designee(s) approves the cost and schedule impact it will provide written notification to Accenture. Change Requests must be mutually agreed upon by the Parties and signed by authorized representatives from both Parties to authorize implementation of the changes. Until the Change Request is agreed in writing, both parties will continue to act in accordance with the latest agreed version of the SOW. Any changes to the Statement of Work shall be subject to mutual written agreement by both parties. Accenture shall not implement any changes without the written approval of the City team's authorized representative or perform any work at-risk and request payment for such work at-risk based upon anticipation of City approval of a pending or future Change Request.

2.9 Acceptance Criteria

Below is the criteria for deliverable acceptance.

General Conditions

- Only designated employees of the City team (or their authorized delegates) will provide acceptance of deliverables.
- The City will conduct UAT and provide acceptance for the system within ten (10) business days of the UAT period completion or as otherwise agreed upon. The user acceptance period will be specified in the project schedule.

System Acceptance

The following elements will need to be tested before the agreed upon date for UAT completion.

- Up to 50 Service Requests
- 25 Knowledge Base articles
- The CRM Capsule self-service web portal with client branding.
- The CRM Capsule self-service citizen mobile application build
- Email to Case CRM functionality
- Chat and Chatbot CRM functionality
- CTI Integration functionality
- Five Salesforce dashboards and ten reports
- The Accenture Mobile Worker App
- SMS text to case functionality using Twilio
- Data Migration sample load

3.0 Pricing & Payment Terms

Our approach to pricing of the MyJax CRM system is to provide a fixed price for the system installation and configuration of the CRM Capsule and Salesforce solution to meet the City's functional and technical requirements. We have built into our fixed price a recommendation of the CRM licensing model that allows maximum flexibility to the City to provide full access to the City desktop users as well as lightweight mobile access to City staff who require it.

CRM Software Implementation Services (one-time costs) - This cost includes implementation services including the installation of the CRM Capsule, Self Service Apps, Mobile Worker App, discovery, configuration services, training, testing, development of integrations, and other tasks outlined in the project plan and deliverables. We also include support for the cut-over and GoLive of the CRM solution on Salesforce.

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Accenture has estimated 50 Services Request Types to be configured in our quote. If the City has additional Service Request Types to configure, they can be purchased in groups of 50 for $70K each with an 8-week schedule for each group of 50 SR types.

Our Implementation services use the Accenture Global CRM team resulting in a lower implementation cost to the City in Year 1. The Accenture Global implementation team has been used on almost every CRM project by Accenture, including Tampa, Miami Dade County, Dallas, Suffolk County, Baltimore, Spokane, Alexandria, Washington DC, and others.

Recurring Software Maintenance Costs Year 1 - CRM License Subscription and Support Cost - The Year 1 CRM Capsule site license recurring annual costs are provided below broken into the support and maintenance purchased from Accenture. Managed Services for basic support prices are shown for the first year.

We have proposed what we believe to be a good combination of our Capsule Site License subscription to work with the purchased Salesforce License subscriptions for users to operate the CRM solution consisting of a mix of Agent/Desktop users at the MyJax Customer Service Center and in key positions in Departments, Knowledge base admin users and Departmental Mobile Worker App users. The City can always purchase future additional user license subscriptions on an as needed basis from Salesforce. For year 1, we have included Mobile Worker app licenses to cover up to 30 additional City staff and field staff who work in the field as needed.

Since the City has indicated there could be as many as up to 815 City users of the CRM, we believe that as the City looks to grow the number of City employees with access to the CRM, **the City would not need as many licenses from Salesforce if they take advantage of the Capsule Mobile Worker App that can allow additional users while only needing 2 Service Cloud licenses. The quoted price for Salesforce is for Public Sector Foundation full-use and restricted-use users.** The actual number of required licenses can be determined during negotiations for the City to take advantage of the Capsule mobile worker app and save money on annual licenses.

Our **CRM Capsule** site license recurring basic support and maintenance subscription includes:

- Agent Console
- Department Console
- Service Request Configuration Console
- Open311 API
- ESRI GIS/CTI ready Integration
- Mobile Worker App
- Self-Service Web Portal and Self-Service Citizen Mobile App
- Basic Capsule Support

Upgrades and support of the CRM Capsule are provided as follows:

- Basic Capsule Support Subscription includes:
  - License to use the Capsule
  - Access to the online Capsule Ticket Portal
  - 1 hour of review on all tickets
  - Product Bug Fix
- Managed Services - new project for every renewal
  - Base MS (Application Support or Capsule Support)
  - SF release compatibility
  - Up to 2-3 refreshes (based on size of client) per year for up to 3 sandboxes
  - Implementation bug fixes
- Discretionary Managed Services - hours available for use as needed

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The year 1 prices shown below for the Capsule and support are discounted for year one during the project implementation timeframe and include the basic support only. Year two, the Capsule subscription and the Managed Services support increases to include 100 Mobile Worker App users and Managed Services level support is added to the Basic Capsule support for $45,000.00 a year. The City can also add a customized package of Managed Services discretionary hours at the hourly price levels shown in the table below.

Our **Mobile Worker App** subscription is for mobile users and other City Department staff that work in the field using iOS or Android smartphones and tablets and is priced in user number ranges to allow flexibility for how the City would need to use it to provide Department staff in the field access to the CRM system. As needed, it would be very easy to quickly expand the Mobile Worker app use in the event of emergency events or high demand situations, much easier than purchasing and then canceling Salesforce full use licenses.

User Subscription License Methods - To provide City wide coverage for most users, we believe that City desktop users would need Salesforce and CRM Capsule subscriptions, while our Mobile Worker App can meet the needs of City staff in the field who need to create new requests, view existing requests in their queue, work and close any assigned cases or activities from their connected mobile device. Here is how our proposed subscription user counts with a blend for the whole City would look:

- **815 Desktop Users** - for MyJax staff and City users who would need to run Agent Console, Department Console, Reports, Configuration and System Administration consoles on a desktop workstation. This license is priced per named user and includes the Salesforce Lightning Service Cloud license and use of the CRM Capsule package. Most of these licenses will be reserved for MyJax and City staff, one Service Cloud license will be reserved for the Accenture Admin Support and 2 PSF Service Cloud licenses reserved for the Mobile Worker App assignment.
- **100 Mobile Worker App Users** – for City users who would need to monitor their assignments to work service request cases, complete activities and close out cases, and who would need occasional access to create new service request cases. This license is based on ranges of users and provides wide flexibility to offer low-cost access to the system for most all City users using their connected iOS or Android mobile device.
- **4 Knowledge Administrator Users** - for City users who would need to author and publish knowledge base articles.
- **30 Bucher+Suter Third Party License Subscription (per year costs)** - These licenses would be used by MyJax agents who utilize the telephony integration between the City's Cisco phone system and Salesforce/CRM Capsule.

Self-Service License Methods - For customers to access the self-service solutions, we use the Salesforce Customer Community portal that allows for three different types of users from the public:

- **200 Portal Account Registered users** - for customers who want to create a CRM self-service portal login account. This license is priced per customer log-in to the portal per month.
- **Unlimited Portal Unregistered users** – for customers who will provide their contact information when making service requests but will not create a user login account. This license is for unlimited use by portal users who do not log in.
- **Unlimited Anonymous Unregistered users** - for customers who want to remain anonymous when making service requests or viewing self-service portal information. This license is for unlimited use by portal users who want to be anonymous.
- **Citizen Mobile App users** - there are no limits to the number of customers who can use the mobile self-service app for iOS and Android. Registered users of the mobile app are the same as the registered users of the Web Portal.

Mobile Worker App User Growth - The City can also purchase additional Mobile Worker app licenses above the 100 included in the packaged Capsule recurring software maintenance costs as proposed. The City and Accenture can work to negotiate the additional recurring maintenance costs of adding more mobile worker app licenses when needed or when the City is ready to expand mobile app use by field staff.

3.1 Summary Pricing

The Table below outlines the summary pricing for the project.

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Category	Type	Price	Notes
One Time	Accenture Professional Services	**$530,000.00**	Accenture is providing a one-time professional services discount
Year 1 Licenses and Managed Services Basic Support (Discounted Year 1)	Accenture CRM Capsule Site License with Dept Worker App (30 users) includes basic support and maintenance only	**$105,000.00**	Payment will be made at Project Kickoff and basic support services includes one upgrade in year 1
Total (One Time + Year 1 License)		$635,000.00	
Year 2 Licenses and Subscription Support	Accenture CRM Capsule Site License with Dept Worker App (100 users) and Subscription Support for Capsule Upgrades	**$170,000.00**	Payment will be made at annual project renewal date
Year 2 Managed Services Base Support	Support for Implementation Configurations, Salesforce Release Compatibility and Sandbox refresh	**$45,000.00**	Payment will be made at annual project renewal date
Year 2 Managed Services Support and Maintenance with Discretionary Services	Managed Services Discretionary Services	**TBD**	Discretionary hour packages are available: up to 100 hours at $115 per hour, up to 300 hours at $112 per hour, above 300 hours at $110 per hour

Mobile Worker App Expansion Costs Added to the annual Capsule Price	Price
1-30 Users	included in Year 1 Capsule price
30-100 Users	included in Year 2 Capsule price
101-200 Users	$40,000.00
201-500 Users	$80,000.00
501 Users and above	Call

3.2 Accenture - Payment Schedule

The table below outlines the project's deliverable-based payment schedule. The amounts specified are lump sums for each row, and each row may contain one or more deliverables as part of the specified rows' fixed fee amount. The invoice amounts (example $50,500 for the first row) will only be invoiced upon City acceptance of each deliverable specified (example, "Install CRM Capsule" and "Implementation Plan" for the first row must each be accepted by the City prior to an invoice for $50,500 being submitted to the City for payment). The Invoice Date column is provided to set an expectation as to the general timing that is anticipated for the completion of each Milestone/Deliverable, however, the invoices are not intended to be generated based on monthly payments. Please see also Section 4. (Invoices; Fees, Payment) in the Professional Services Agreement for further invoicing procedures.

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Type	Invoice Date	Milestone/Deliverable	Amount
Accenture Professional Services	Project Kickoff	Install CRM Capsule Implementation Plan	$50,500.00
	Month 1	Project Plan Business & Technical Alignment Sessions SR Template Training	$80,500.00
	Month 2	Populated SR Configuration Templates (City) SR Configuration Tracking Support integrations Knowledge article templates	$80,500.00
	Month 3	City ESRI GIS integrated with CRM Support Integrations Configure Service Requests	$80,500.00
	Month 4	City reviews Service Request Configurations Users Added to system Prep for UAT	$80,500.00
	Month 5	System Wide UAT Train the Trainers Training Data Migration	$80,500.00
	Deploy to Production and Ready for Go Live	CRM Production environment is ready GoLive date scheduled Managed Services enabled	$77,000.00
Total Professional Services			$530,000.00

4.0 Key Assumptions & Considerations

The following assumptions apply to this SOW. They are in addition to other assumptions found throughout this document.

1. This proposed plan assumes out of the box CRM Capsule implementation without any customization provided by the Accenture implementation team and Salesforce. Accenture will work with the City to adapt your requirements to the existing out-of-the-box capabilities of the CRM Capsule and Salesforce to help the project stay inside the agreed scope of work and fixed price costs.

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2. After the City obtains the Salesforce licenses as required for the project to begin, Accenture will set up Salesforce CRM environments for this project called sandboxes that could include Dev, QA, QATraining, HotfixDev, and a fresh Production org will be used for CRM implementation.
3. The proposed implementation plan assumes that these key configuration activities for our CRM Capsule on Salesforce are in scope:
    a. Accenture will configure up to 50 SR types (1 standard activity with 3 standard outcomes per SR type) for this project, all remaining SR types can be configured jointly by the City Admin team with support as required by Accenture after the final determination is made after the discovery phase of how many final SR types will be needed for Go Live.
    b. Accenture will author and publish up to 25 Knowledge articles and content in the Salesforce knowledge base, all remaining knowledge content can be configured and integrated with the CRM Capsule as authored jointly by the City KM Admin team with Salesforce KM Tools.
    c. Accenture will build 10 Reports and 5 Dashboards specific to the City's requirements using standard Salesforce out-of-the-box reporting capabilities. These are in addition to the standard reports that come included with the CRM Capsule and Salesforce CRM solution.
    d. Client must provide a completed Configuration Workbook within four weeks of project kickoff.
4. The SOW assumes that the CRM Capsule consoles, Self-Service Web Portal/Citizen Mobile app, and the City Mobile Worker app will be implemented.
5. The CRM Capsule Customer-facing self-service Mobile app and web portal will be provided as is. Any enhancement requirements discussed during the discovery session could be addressed as possible enhancement in future releases of the product. The plan assumed delivery of the CRM Capsule self-service applications Web 2.0 & Mobile 2.0 versions.
6. The SOW assumes the standard chatbot that comes with Salesforce and the CRM Capsules will be implemented. Any integration requiring Accenture team to develop something extra would be a separate effort post-discovery
7. Multi-language is a feature of the public facing web portal and for the Citizen App only. The city must provide the translation for all the service types.
8. SMS integration for outbound text notifications would require integration with the City's Twilio text solution available at project kickoff. This may be a custom development feature if Twilio is not supported with the next Capsule release.
9. CTI Integration with the Capsule/Salesforce is in the plan using the Bucher+Suter third party Salesforce Connects app exchange product.
10. The GIS integration will be done as part of the project, the City will provide the following for ESRI/ARCGIS integration at kickoff:
    a. ARCGIS version will be 10.X or higher
    b. There must be one Composite Locator Service containing the necessary locators
    c. All service should be either be publicly accessible or authenticated
    d. There must be one Composite Locator Service containing the necessary locators.
    e. All services must be https using TLS 1.1 or higher.
    f. All services must be https and require server and client certificate chains to include all intermediate certificates that exist between the server or client certificate.
    g. GIS integration is already built into the CRM Capsule cost so there are no additional implementation costs for ESRI integration.
    h. ESRI/GIS integration assumes that the City would provide us a public REST endpoint to integrate with.
    i. Certain ESRI/GIS requirements might require the City's GIS team to make changes based on the requirements confirmed in the discovery sessions with the City team and 311.
11. For Data Migration, Accenture assumes the City will provide the following.
    a. Staging Database with Accenture identified table and field structure
    b. Clean Legacy data to be migrated in the required structure and format
    c. Mapping for Legacy data to Capsule solution data model
    d. Perform Data Validation of Sample Data Load in Data Migration sandbox and Full Data Load in Production environment
12. SSO for Internal users will be implemented.
13. Web browser compatibility for Salesforce is limited to N-1 versions.
14. ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility. Our

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Capsule solution generally conforms to 508 standards, we are happy to work with the City post-award to provide compliance where needed.

15. The City's external systems will be able to consume APIs that conform to Open311 standards and/or Salesforce API Standards. Accenture will not develop new APIs as part of this effort. As such, all integrations with City systems will be through Accenture Enhanced Open311 API standards, Salesforce API and readily available connectors. Modifications to this API are out of scope and not included in our pricing. Building custom APIs is not in scope. For each integration, Accenture will consult with the City IT team on how the target system can consume and utilize the provided APIs, and we will perform the SR configuration necessary to support the integration use case from the CRM Capsule side of the API.
16. Accenture will consult on the Open311 API for the City's Integration to City Departmental systems. Only consultation has been considered in scope for 3rd Party Integration. Any integration requiring the Accenture team to develop something extra would be a separate effort post-discovery.
17. Salesforce storage limits apply unless otherwise indicated. The City can purchase
    a. Additional cloud-based storage from Salesforce or
    b. Other third-party cloud storage providers or
    c. Use their existing storage solutions
18. All Salesforce general, feature, storage and license limits apply. For more details please see: https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_gov_limits.htm and https://help.salesforce.com/articleView?id=collab_files_size_limits.htm&type=5
19. All required Salesforce licenses will be purchased from Carahsoft and available for Accenture use at the project kick-off. The City can negotiate Salesforce Licenses for years 2 and beyond with Carahsoft/Salesforce directly.
20. There will be a 3.5% Year-over-Year escalation for the Accenture CRM Capsule Site License + Mobile Worker App and Managed Services Basic Support and Maintenance and third-party software maintenance starting in Year 3.
21. Platform security is provided by Salesforce. Relevant security plans and documentation to be provided by Salesforce.
22. We are going to use Prodly as a Service Request configuration migration tool between non-production and production orgs.
23. Decision to implement Private Sharing will be decided in discovery phase and scope will be adjusted accordingly
24. Training activities as described in this response require the involvement of City resources.
25. Additional work required due to delays caused by the City's team will be managed through a Change Request process.
26. Business Process Reengineering (BPR) is not included in our implementation scope.
27. Overall project schedule relies on adherence to the UAT period in Section 2.9. Delays could result in additional costs and will be escalated to the Project Executive Sponsor.
28. The City will designate a single executive sponsor/decision maker that will sign off on each deliverable.
29. The following assumptions identify capabilities of our CRM Capsule CRM Solution that are not being implemented in this project plan and were not included in our BAFO cost proposal:
    a. Text Bot is a capability of the solution and would require developing the features custom after the discovery sessions at an additional cost.
    b. There is an additional cost for Google translation services from Accenture for multilingual service request types which is not considered in the scope.
    c. 311 Vision when implemented will have additional cost of 3rd party services. The 311 Vision feature software is included in our CRM Capsule site license subscription. Utilization of the feature requires additional services work setting up the 311 Vision machine learning algorithms that we recommend the City consider in a later year.
    d. Push Notification functionality in the capsule requires an additional cost of the 3rd party Transport Application.
    e. Social integration with CRM is a capability of the solution that can be a future implementation project for an additional cost of services and licenses based on the City's social media tool preferences.

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5.0 Period of Performance

The period of performance will be from the execution of this agreement through the agreement and contract completion date. Client and Accenture may extend the Statement of Work with mutual agreement.

6.0 Place of Performance

Work will be performed both on-site at the Client's offices and off-site.

7.0 Points of Contact

For Accenture:

Ajay Batish, Managing Director
Accenture LLC
500 W Madison St
Chicago, IL 60661
Email: ajay.batish@accenture.com
Phone: 703.819.6028

For Client:

Authorized Signature: _____
Name: _____
Title: _____
Signature Date: _____

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Appendix A - Capsule Subscription Agreement

Subscription Agreement

This Subscription Agreement (the **"Agreement"**), is effective as of _____ and is by and between the City of Jacksonville FL ("Client") and Incapsulate, part of Accenture ("Incapsulate"), a Delaware limited liability company.

1. Definitions.

A. **"Claims"** or **"Claim"** means, collectively, lawsuits, actions, complaints, claims, assertions of liability (whether oral or written), losses, damages, liabilities, awards, costs and expenses.

B. **"Confidential Information"** is defined in section 11.B of this Agreement.

C. **"Days"** means calendar days, not business days, unless expressly stated otherwise.

D. **"Intellectual Property"** means all intellectual property rights without limitation including patentable inventions, copyrights, trade secrets, trademarks, service marks, certification marks, know-how, and domain name rights. Intellectual Property also includes all patents and patent applications, and the reissues, divisions, continuations, renewals, extensions, continuations-in-part, and improvements thereof.

E. **"Party"** means one of the parties to the Agreement. **"Parties"** means both parties to the Agreement: Subscriber and Incapsulate.

F. **"Software"** means Incapsulate's CRM Capsules which shall operate on the Subscriber's implementation of Salesforce in its 311 systems. Specific Capsules licensed by the Client, License term and financial terms are specified in Appendix A. The Software is installed in Client's Salesforce environment, as Managed Packages.

G. **"Subscriber"** means the City's_____.

H. **"Subscriber Data"** means all electronic data or information submitted by Subscriber as part of Subscriber's use of the Software.

I. **"Subscription"** means the license as purchased to use the Software.

J. **"Subscription Term"** means the term of the Subscription purchased by Subscriber. Unless expressly indicated otherwise by Incapsulate in writing, the Subscription is for one year and shall automatically renew annually upon the date of the purchase of the Subscription by Subscriber. Thirty days prior to each renewal, Subscriber agrees to pay for the next annual Subscription. Each annual subscription shall be at a cost of no more than seven percent greater than the prior year's Subscription amount.

2. Terms of Usage.

A. Provision of Software. Incapsulate shall make the Software available to Subscriber pursuant to this Agreement for the duration of the Subscription Term. This Agreement is not contingent on including future functionality or features with the Software and is not entered into in reliance on any promise or representation by Incapsulate or its agents concerning any future functionality or features of the Software.

B. License. Incapsulate grants to Subscriber a non-transferable, non-exclusive license, subject to the Terms of this Agreement, for the Subscription Term, to use the Software. Under no circumstances shall Subscriber be entitled to receive the source code to the Software, even if in case of a breach by Incapsulate. This License is limited; no other uses of the Software are implied.

C. Limitations on License.

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(1) Subscriber may not sublicense or rent the Software to others.

(2) Subscriber may use the Software only in connection with providing its 311-related services.

(3) Subscriber may not use the Software to provide consulting services to third parties.

(4) Subscriber may not decompile, reverse engineer, disassemble, transfer, distribute, resell, assign, sublicense, commercially exploit, or otherwise use the Software to create any derivative works.

(5) Subscriber may not use any network monitoring or discovery software to determine the architecture of the Software.

(6) Subscriber may not use any robot, spider, or other automatic software or device, or manual process to monitor or copy the Software.

(7) Subscriber may not use any aspect of the Software to create similar software or services.

(8) Subscriber may not interfere with or disrupt the integrity or performance of the Software.

(9) The Parties agree that the Agreement constitutes a License, not a sale, of the Software. Any attempt by Subscriber to transfer the license in the Software, except as expressly permitted in writing by Incapsulate, shall result in immediate termination of the Subscription.

D. Violation of the License. Should Subscriber violate the License (e.g., violate any prohibition contained in section 2.E of this Agreement) and not cure that violation within the time provided herein, and should Incapsulate undertake litigation against Subscriber to protect Incapsulate's interests, Incapsulate shall be entitled to recover its reasonable attorneys' fees and costs.

3. Intellectual Property Ownership. The Software shall remain the exclusive Intellectual Property of Incapsulate. Subscriber does not acquire any ownership in the Software because of this Agreement. Subscriber acknowledges, shall not challenge, and shall not voluntarily aid any third party in challenging Incapsulate's Intellectual Property of the Software. Per the License, Subscriber can only use the Software within _____ but cannot reassign, transfer, or resell outside.

4. Use by Subscriber's Contractors. Subscriber's contractors may exercise on Subscriber's behalf Subscriber's entire license rights to the Software, provided that (i) the entire use of the Software by Subscriber's employees and contractors remains within the parameters stated in the Agreement, (ii) those contractors agree to not further disclose, transfer or allow access to the Software to third parties, (iii) such contractor usage is solely for Subscriber's purposes, and (iv) the contractors abide by the limitations in section 12.B of this Agreement ("Confidentiality"). Subscriber shall be liable for any breach of this Agreement by its contractors.

5. Subscriber Responsibilities.

A. Subscriber's Computer Environment. Subscriber is solely responsible for the quality and maintenance of the computing environment from which it will access the Software.

B. Salesforce. Subscriber is responsible for licensing Salesforce software sufficient to interface with the Capsules and with the same number of seats as required under the License. At Subscriber's request, Incapsulate will assist in the procurement of the appropriate Salesforce license.

C. Internet Browser Compatibility. Incapsulate shall ensure that the Software is usable with Internet browsers that are compatible with Salesforce.

D. File Conversion. Incapsulate is not responsible for converting Subscriber's data files for use with the Software.

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E. Data. Subscriber is solely responsible for the accuracy, completeness, and integrity of all data that it submits to or derives from the Software.

6. Incapsulate's Responsibilities.

Capsule Updates. The Capsule will be updated as required to ensure compliance with Salesforce Seasonal releases. This is anticipated to entail up to three (3) Capsule releases per year, (usually Spring, Summer and Winter to align with the Salesforce Seasonal releases) but may vary according to the Salesforce Seasonal release schedule. New Capsule releases shall be made available to the Subscriber on a mutually agreed schedule. The following apply to Capsule updates:

1. The Subscriber is responsible for applying the Capsule updates to the Subscriber's Salesforce Org and performing any related activities (e.g., installation, associated User Acceptance Testing, configuration, training) notwithstanding the existence of a separate support (i.e., Managed Services) agreement with Incapsulate
2. Incapsulate will provide defect resolution support, limited to defects within the Capsule itself, as below (See Capsule Defect Resolution)
3. Incapsulate can provide consulting, upgrade and training at additional cost on either a T&M basis (preferred) or Fixed Price basis. Such services are offered on a case-by-case basis through individual SOWs or on a recurring basis via the Incapsulate Managed Services offering (which requires a separate agreement)

Capsule Defect Resolution. Incapsulate will provide defect resolution support for functionality of Capsules not working as designed. Defects resulting for any other issues (e.g., improper configuration of the Capsule, Subscriber custom development) are not covered under this agreement.

- Defects will be classified (and responded to) according to the following severity levels:

Severity Level (Title)	Description	Response / Resolution Approach Service Level Agreement (SLA)
Level 1 (Significant)	Causes failure of the system resulting in the inability to perform essential, customer-focused tasks (service request intake, service request routing, and/or service request closure) and/or unrecoverable loss of critical data (e.g., service request details or critical customer information). No workarounds exist.	• Initial response with preliminary estimate and plan to resolve within 4 hours (Incapsulate business days 9AM-5PM EST) of Incapsulate's receipt of the defect • Daily status updates to impacted Subscribers • Capsule Patch Release issued once an issue resolved.

Level 2 (Moderate)	Results in reduced functionality essential for successful operations. A work around exists but its sustained use is unsatisfactory.	• Initial response within 24 hours
		• Depending on specific nature of the issue, either:
		  ○ Capsule Patch Release issued as soon as issue resolved
		  ○ Issue resolved in next scheduled (e.g., Seasonal) Capsule release

Level 3 (Minor)	Results in reduced functionality for non-critical aspects of the system. A work around exists.	• Initial response within 48 hours • Issue resolved in next scheduled (e.g., Seasonal) Capsule release

Subscribers shall be able to submit tickets electronically (via email) at anytime. Incapsulate will provide a phone number for submission of Severity Level 1 tickets between the hours of 9AM - 5PM (EST) on Incapsulate's business days.

Incapsulate reserves the right to bill the Subscriber for time spent triaging (e.g., issue investigation, research, Subscriber consultation) tickets reported that turn out to be non-issues or turn out to be caused by factors other than the Capsule (e.g., other vendors, Salesforce platform components) according to an established Schedule of Fees.

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Incapsulate will whenever possible notify a client if Incapsulate identifies a pattern of issues being submitted without expected triage before initiating billing as described here.

7. Incapsulate's Warranties and Covenants, Remedies and Disclaimer.

A. Availability. Availability of the Software is subject to the availability of the Salesforce environment. Subscriber expressly acknowledges and understands that there will be with exceptions to Availability for commercially reasonable downtime in line with other commercial software services for business functions, including such commercially reasonable downtime due to maintenance and, for repair, or updates whether scheduled or otherwise occasional technical difficulties.

B. Subscriber Data Security Warranty. Incapsulate shall maintain commercially reasonable administrative, physical, and technical safeguards for protection of the security, confidentiality, and integrity of Subscriber Data. Incapsulate shall not (i) modify Subscriber Data, (ii) disclose Subscriber Data except as compelled by law in accordance with a **"Compelled Disclosure"** (as set forth below) or as expressly permitted in writing by Subscriber or by this Agreement, or (iii) access Subscriber Data except to provide the Software or prevent or address service or technical problems, or at Subscriber's request. (The foregoing is the **"Subscriber Data Security Warranty."**) Nevertheless, despite the foregoing, should there occur a breach in the security of Subscriber Data (a **"Subscriber Data Security Breach"**), such as but not limited to disclosure by Incapsulate of Subscriber Data to an unauthorized third party or Incapsulate permitting an unauthorized third party to have access to Subscriber Data, then Incapsulate's sole notice obligation shall be to give notice to Subscriber of that data security breach. It shall be Subscriber's sole responsibility (and not Incapsulate's responsibility) to give notice of the Subscriber Data Security Breach to any other person or party as required by applicable law or as may be prudent for legal or business reasons. Incapsulate shall have no other responsibility or liability for a Subscriber Data Security Breach than otherwise set forth herein including, but not limited to, any security breach involving or resulting from Subscriber's use of Salesforce.

C. Remedy for Breach: Should Incapsulate breach the Subscriber Data Security Warranty, Subscriber's sole remedy shall be for Incapsulate to repair the Software by restoring them to the standard of the applicable warranty.

D. Warranty Disclaimer. Incapsulate provides only the covenants and warranties stated expressly in this Agreement. INCAPSULATE MAKES NO OTHER COVENANTS OR WARRANTIES AS TO THE SOFTWARE, AND IT DISCLAIMS EACH OF THE FOLLOWING WARRANTIES THAT MIGHT OTHERWISE BE IMPLIED BY LAW: (i) IMPLIED WARRANTY OF MERCHANTABILITY; (ii) IMPLIED WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE, EVEN IF INCAPSULATE HAS BEEN ADVISED OF SUCH PURPOSE; (iii) IMPLIED WARRANTY OF NON-INFRINGEMENT, NON-MISAPPROPRIATION, AND NON-INTERFERENCE; (iv) IMPLIED WARRANTY OF ACCURACY; AND (v) IMPLIED WARRANTY OF SYSTEM INTEGRATION. Subscriber agrees that no representations, warranties or covenants have been made regarding the Software other than those in this Agreement.

8. Audit. Incapsulate may audit the business records and computer systems of Subscriber to ascertain whether Subscriber's use of the Software has been and is within the scope of the Subscription granted to Subscriber, including but not limited to compliance with: (i) the limitation of usage to the designated Subscriber; and (ii) the confidentiality, trade secret, and non-circumvention obligations set forth in this Agreement. Incapsulate shall provide Subscriber at least 30 days' notice prior to an audit. Incapsulate may use contracted professionals to assist in the audit or to conduct it on behalf of Incapsulate, such as accountants and computer technicians. Incapsulate shall be responsible to Subscriber for ensuring that any such contracted professionals maintain the confidentiality of Subscriber's Confidential Information. Subscriber shall cooperate in any such audit by making relevant business records and computer systems available to Incapsulate and organized for review. Subscriber shall not destroy evidence of the extent of its use of the Software between the time of receipt of notice of an audit and the completion of the conduct of the audit; doing so shall create a presumption that Subscriber was willfully using the Software in excess of its license rights. Incapsulate may not audit more than once per calendar year unless a past audit by Incapsulate has demonstrated that the Subscriber was using the Software in violation the terms of this Agreement. If Incapsulate's audit does not uncover any violation of the terms of this Agreement, then each Party shall bear all of its own costs associated with the audit. If Incapsulate's audit reveals usage of the Software in violation of the terms of this Agreement, then the Subscriber shall pay to Incapsulate all of Incapsulate's out-of-pocket costs

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associated with the audit plus Incapsulate's then-current list-price for any unlicensed usage of the Software, i.e., the price that Incapsulate charges to a subscriber who does not presently have a Subscription to the Software and who is not entitled to any discounts. Subscriber shall pay such sums within 30 days of written notice of the audit results from Incapsulate, and Subscriber shall pay interest at a rate of 1.5 percent per month on any sum not paid within such 30 days. Should Incapsulate deem it necessary to utilize legal services to collect the sum due from Subscriber, Incapsulate shall be entitled to collect its reasonable attorneys' fees and costs from Subscriber, including both legal fees spent before and after the filing of suit. Incapsulate's rights and remedies stated in this section do not limit the other causes of action and remedies that Incapsulate may have under the Agreement or applicable law.

9. Limitation on Liability.

A. FOR ALL CLAIMS ARISING FROM OR RELATED TO THIS AGREEMENT OR ITS SUBJECT MATTER, IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER FOR THE PAYMENT OF ANY CONSEQUENTIAL, INCIDENTAL, OR PUNITIVE DAMAGES, OR DAMAGES FOR LOST BUSINESS, LOST PROFITS, INTERRUPTED OPERATIONS, OR LOST OR DAMAGED DATA, EVEN IF THE PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. INCAPSULATE'S ENTIRE LIABILITY TO SUBSCRIBER FOR ALL CLAIMS ARISING FROM OR RELATED TO THIS AGREEMENT OR ITS SUBJECT MATTER, WHETHER IN CONTRACT, TORT OR OTHERWISE, SHALL NOT EXCEED THE TOTAL AMOUNT OF SUBSCRIPTION FEES PAID BY SUBSCRIBER TO INCAPSULATE UNDER THIS AGREEMENT.

B. THE LIMITATIONS OF LIABILITY, DISCLAIMERS OF WARRANTIES, EXCLUSIVITY OF REMEDIES, AND OTHER LIMITATIONS IN THIS AGREEMENT ARE AN ESSENTIAL ELEMENT OF THE BARGAIN BETWEEN THE PARTIES (WITHOUT WHICH THE TRANSACTIONS CONTEMPLATED BY THIS AGREEMENT WOULD NOT OCCUR) AND WILL APPLY EVEN IF A REMEDY, WARRANTY, OR COVENANT FAILS IN ITS ESSENTIAL PURPOSE.

10. Marking and Usage of Data

A. Markings. Subscriber shall not remove, obscure or alter any Intellectual Property marking, confidentiality marking, or legal notice included with or otherwise relevant to any aspect of the Software. Subscriber shall not permit others to do so.

B. License to Use Feedback. Subscriber grants to Incapsulate an irrevocable, royalty-free, worldwide license of unlimited duration to use, modify, and incorporate into the Software any feedback, suggestions, requests, or recommendations relating to the Software.

C. Usage Data. Subscriber grants to Incapsulate an irrevocable, royalty-free, worldwide license of unlimited duration to use, modify, and incorporate into its own support offering, product development, operational plans, and sales or marketing materials, any anonymous usage data acquired from Subscriber's use of the Software.

D. Use of Name. Subscriber expressly agrees that Incapsulate may make references to Subscriber and Subscriber's URL and may use Subscriber's name, trademark, and logo for the limited purpose of publishing it in Incapsulate's current list of subscribers. Incapsulate may also respond to any inquiry regarding whether Subscriber is a licensee and user of the Software.

11. Term and Termination; Renewal. The Agreement will remain in effect for the Subscription Term unless terminated earlier by a Party for a reason stated below.

A. Term. Unless expressly indicated otherwise by Incapsulate in writing, the Subscription Term is for one year measured from the date of this Subscription Agreement.

B. Automatic Subscription Renewal. The Subscription shall automatically renew after each Subscription Term for an additional year unless the Subscriber notifies Incapsulate at least 30 days before the end of the Subscription Term that it chooses not to have the Subscription renew.

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C. This Agreement may be terminated as follows:

(1) by either Party, upon Notice, if the other Party is in material breach of any of its obligations and the breach is not capable of being cured;

(2) by Subscriber providing notice of non-renewal at least 30 days prior to the end of any Subscription Term;

(3) by Incapsulate providing notice of non-renewal at least 30 days prior to the end of any Subscription Term; and

(4) Immediately by Incapsulate after providing Subscriber notice that it is in violation of this Agreement and Subscriber fails to cure such violation within 15 days of the date of such notice of violation.

D. Termination. Within five days of the effective date of termination, Subscriber will certify in writing to Incapsulate that Subscriber has ceased any and all use of the Software. Should Subscriber fail to so certify within those five days after termination, Subscriber agrees that it shall be liable for a Subscription fee in an amount of one month pro-rated to the annual fee.

E. Termination of this Agreement shall not bar either Party from pursuing any cause of action or remedy it may have available against the other Party for breach of the Agreement.

12. General Terms.

A. Assignment. Incapsulate may assign the Agreement to a successor to its business or purchaser of a majority of controlling interest. This Agreement may not be assigned by Subscriber.

B. Confidentiality.

(1) **"Confidential Information"** means, collectively: (a) the trade secrets of a Discloser; (b) information that Discloser has kept confidential; (c) information that Discloser is obligated to keep confidential to some extent by law; and (d) information that a third party has provided to Discloser under an obligation of confidentiality.

(2) Confidential Information of Subscriber. The Subscriber Data is the Confidential Information of Subscriber.

(3) **"Recipient"** means the Party receiving Confidential Information.

(4) **"Discloser"** means the Party that discloses, transmits or allows access to Confidential Information to Recipient.

(5) Marking. The Subscriber Data are Confidential Information and do not need to be marked as such to have such status. For any other information to have Confidential Information status, Discloser must mark it conspicuously as "Confidential Information" or with other words that convey the same meaning, unless federal, state or local law makes that type of information confidential (e.g., "protected health information" under HIPAA).

(6) Exclusions from Confidential Information. Confidential Information shall not include information that: (a) constitutes general skills and experience gained under this Agreement; (b) is already known by Recipient at the time of disclosure as established through written evidence pre-dating this agreement; (c) is publicly available at the time of disclosure or subsequently becomes publicly available through no fault of Recipient; (d) is required to be disclosed by governmental or judicial order; (e) is rightfully acquired by Recipient from a third party who is not in breach of an agreement to keep such information confidential; or (f) is developed by personnel of Recipient independently

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of, and without access or exposure to, the Confidential Information.

(7) Confidentiality Obligation. Except as otherwise provided herein, Recipient shall not disclose Confidential Information, allow access to it or transfer it to third parties, or use it for any reasons other than performing this Agreement or exercising the license rights granted to it under this Agreement. Recipient shall make best efforts to protect the confidentiality of Confidential Information, and shall protect it at least as carefully as it protects its own sensitive confidential information. If a Recipient believes that there has been an unauthorized disclosure, access, transfer, or use of Confidential Information, it shall notify Discloser as soon as possible.

(8) Compelled Disclosure. The Recipient may disclose Confidential Information of the Disclosure if it is compelled by law to do so, provided that the Recipient gives the Disclosure prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the Discloser's cost, if the Disclosure wishes to contest the disclosure. If the Recipient is compelled by law to disclose the Discloser's Confidential Information as part of a legal proceeding (except for litigation initiated by one Party against the other Party), the Disclosure shall reimburse the Recipient for its attorneys' fees and costs incurred and for Recipient's reasonable cost of compiling and providing secure access to such Confidential Information.

(9) Contractors. Recipient may disclose Confidential Information to its contractors provided that such contractors adhere to rules stated in this section, and such contractors use the Confidential Information solely to perform Recipient's obligations under this Agreement. A Recipient who discloses Confidential Information to a contractor shall be liable for the contractor's handling of the Confidential Information as if the contractor were an employee of Recipient. Under no circumstances may a Recipient disclose Confidential Information to a competitor of the Disclosure.

(10) Term of Confidentiality. The confidentiality obligations under this Agreement shall survive with respect to Confidential Information until such information is excluded from the definition of Confidential Information.

C. Taxes. Subscriber shall be solely liable for any taxes resulting from this Agreement or any activities hereunder (exclusive of taxes on Incapsulate's gross and/or net income), even if Incapsulate does not collect the tax from the Subscriber. Any taxes for which Subscriber is liable shall not reduce the amount due to Incapsulate under this Agreement. If either Party determines that a tax will be imposed for which Subscriber is responsible under this Agreement, Incapsulate may require Subscriber to prepay the tax to Incapsulate or the taxing authority, as appropriate, before Incapsulate continues its performance under this Agreement. If Subscriber claims exemption from any taxes, at Incapsulate's request, Subscriber shall provide Incapsulate with documentation sufficient to support tax exemption. Subscriber shall indemnify, hold harmless and defend Incapsulate from any claim asserted by a taxing authority arising from or related to taxes owed (exclusive of taxes on Incapsulate's gross and/or net income) or purported tax exemptions, including all penalties and interest.

D. Agreement Modification or Replacement. The Parties may agree to amend or replace this Agreement at any time in the future, including at the time of any renewal of Subscriber's Subscription to the Software. Any such agreement must be in writing and executed by both parties. This Agreement shall not be supplemented or modified by Subscriber's boilerplate contracting documents, including purchase orders, work orders, order acknowledgments, and shipping documents. The boilerplate terms in such documents shall have no contractual effect unless Incapsulate agrees to them expressly and in writing.

E. Disputes.

(1) Resolving Disputes. This Agreement and the Parties' relationship shall be governed by and construed under the laws of the State of Delaware and applicable federal law, and Delaware's choice of law rules shall not change this governing law. Any litigation between the Parties shall occur only in the state courts for the State of Delaware, or the federal courts in the U.S. District Court for the District of Delaware. Subscriber consents to such personal jurisdiction and irrevocably stipulates that, by entering into this Agreement, such courts have personal jurisdiction over the Subscriber for all claims arising from or related to this Agreement or its subject matter.

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F. Limitation on Time to Assert a Claim. Each party shall assert any claim against the other party arising from or related to the Software within two years of the accrual of the claim. A counterclaim is not barred if the claim filed by the other party is timely under this section. Otherwise, all claims not made within the time provided by this section are waived and barred.

G. Notices. Any notice to Incapsulate shall be directed to this contact and address:

Ajay Batish, Managing Director
Accenture LLC
500 W Madison St
Chicago, IL 60661
Email: ajay.batish@accenture.com
Phone: 703.819.6028

Any notices to Subscriber shall be directed to this contact and address:

_____

_____

_____

_____

Each Party may change its address by the means provided herein for giving Notice. Any Notices sent pursuant to this Agreement shall be in writing (including email), and become effective when the email is received, delivered by hand, or by FedEx or similar commercial carrier.

H. Force Majeure. Incapsulate shall not be liable for any failure or delay caused by events beyond Incapsulate's reasonable control including, without limitation, Subscriber's failure to perform its obligations in a timely fashion. Should Incapsulate be delayed from performing its obligations because of an event beyond its reasonable control, Incapsulate may and shall resume performance when the obstacle to performance is removed. Subscriber expressly agrees that any act or omission on the part of Salesforce which disrupts the Software shall fall under terms of this subsection.

I. Severability. If any term or provision of this Agreement shall be found to be illegal or unenforceable, the remainder of the Agreement will remain in effect.

J. Headings. The headings in this Agreement shall not be considered in interpreting this Agreement.

K. Waiver. No waiver, by either party, of any breach by the other party of any of the terms of this Agreement, shall be a waiver of any other breach of the same or other provisions; no such waiver shall be effective unless in a writing signed by the waiving party.

L. Drafter. This Agreement shall not be interpreted based upon any rule of construction against the drafter.

M. Authorized Signer. Each person signing this Agreement represents and covenants that he or she has the authority to do so on behalf of the entity on whose behalf that person purports to be acting.

N. Survival of Terms. Any terms of this Agreement that by their nature extend beyond the termination of this Agreement remain in effect post-termination.

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AGREED:

Incapsulate, a part of Accenture

By: _____
Ajay Batish, Managing Director

SUBSCRIBER:

_____

By: _____

Name: _____

Title: _____

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Statement of Work (SOW)

Submitted to:

Software and Implementation Services for Economic Development Management Solution

Contact: Nichole Pettway| Nichole.pettway@accenture.com

This Statement of Work is made part of the Professional Services Agreement (hereinafter "Agreement" entered into this 29th day of July, 2024 ("Effective Date") by and between Accenture LLP (hereinafter "Accenture" or "Contractor"), a company, with its place of business at 500 W Madison St, Chicago, IL and the City of Jacksonville, FL (hereinafter "Jacksonville" or "City" or "Client"), with its place of business at XXXXX, Jacksonville, Florida.

Commented [1]: City needs to provide this information

Note: Negotiations with the City relating to this scope of work have previously occurred with Incapsulate LLC as the contractor. As a result of an acquisition, as of May 1, 2024, Incapsulate is integrated into Accenture LLP. All current contracts, including the multi-year contract between Miami-Dade County and Incapsulate LLC, are currently in the process of being transitioned to Accenture LLP. The personnel, solution, implementation plan, and rates remain consistent with the negotiations with Incapsulate LLC: going forward, all documentation and agreements will refer to Accenture LLP as the contractor.

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1.0 Background

Accenture will be configuring and implementing an Economic Development Management Solution, hereinafter referred to as the "Solution", to meet the City of Jacksonville's Office of Economic Development (OED) requirements.

2.0 Scope of Services

This will be a Firm Fixed Price Project and the Purchase Order from the City will be delivered after execution of the Agreement by both parties. The overall purpose of this project is to implement the Salesforce solution for the Office of Economic Development in a phased approach. Phase 1 activities are included in this Statement of Work (SOW). Phases 2 and beyond will be defined at a later date.

The implementation will include, in addition to ongoing project and program management the following activities:

- Configuration and set up of Public Sector Solutions Salesforce application
- Configure 1 User Profile, 3 Roles, and 3 Permission Sets to manage field and object level security
- Configure relationship data model with standard Salesforce objects and newly configured objects to manage OED records
    - Projects, Deliverables, Clients, Location (non-GIS)
    - Up to a total of 6 Custom objects
- Configure fields on objects to capture the metadata required by OED (up to 15 custom fields per custom object)
- Configure the ability to send and receive email from Salesforce
- Configure the activity tracking related to Projects and Clients
    - Emails, Calls, To Do's
- Configure Reports and Dashboard
    - Up to 2 Dashboards with 5 reports per dashboard
- Configure up to 10 List views for Users to manage workload
- Configure 5 Email Templates
- Configure 5 automated Email workflows
- Configure up to 5 Validation Rules to enforce clean data
- Data Migration
    - No more than 1000 total Project (object) records to be migrated
- After the City obtains the Salesforce licenses as required for the project to begin, Accenture will set up the needed Salesforce sandbox and production environments for this project.
- Administration training for the Solution will be provided to the City's designated super users and administrators on the Solution for up to 4 hours. This includes:
    - Up to 4 admin/super Users
    - 2 sessions of 2 hours each session
- Additionally, we will provide Train-the-Trainer sessions for up to 8 hours to train City staff who will then train end users.
    - Accenture will train up to 4 City Trainers.
    - 4 Sessions of 2 hours each session
- Accenture will support the City's End User Training by attending and assisting with the first End User Training session.

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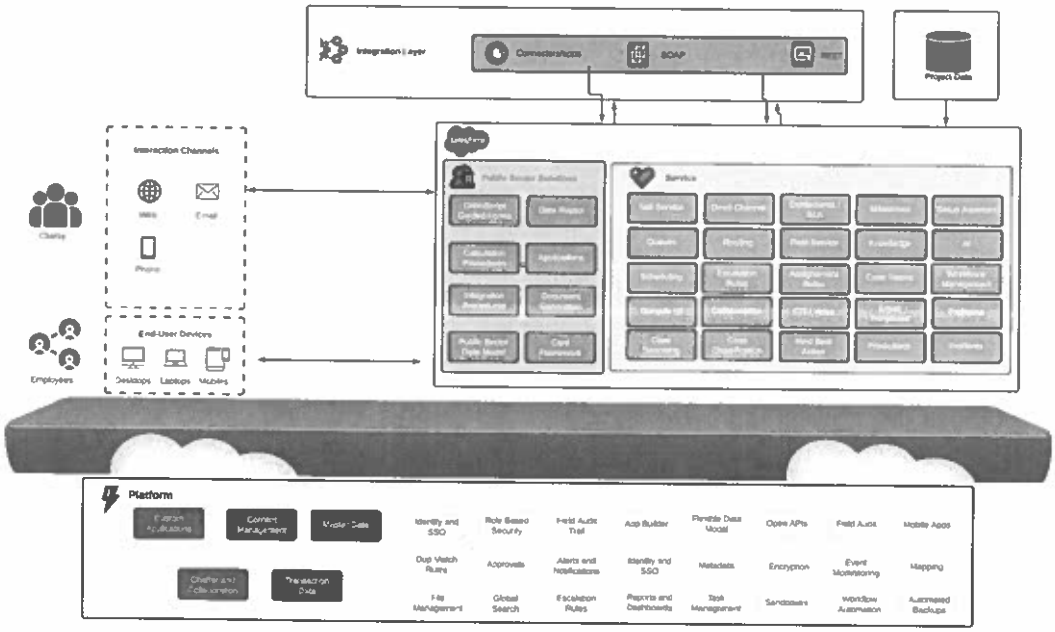
2.1 Solution Overview



Accenture's proposed solution and the Salesforce platform include the following industry-specific capabilities.

Salesforce Data Models - The proposed solution will leverage the standard Salesforce data model for the following functionality including but not limited to Contacts, Users, and Tasks. The proposed solution leverages the Salesforce Public Sector Solutions (PSS) data model for the following system functionality including but not limited to Applications, Permits, Violations and Enforcement, Visits and Inspections. See Public Sector Solutions Admin Guide for Data Model Overview for Public Sector Solutions Standard Objects.

Salesforce Platform - The proposed OED solution will leverage core Salesforce functionality for the following functionality including but not limited to Email Templates, Email Alerts, Flows, Queues, Assignment Rules, Files, Approval Processes, Record Types, Record Pages, standard permissioning and User management. The Salesforce Lightning Console is a unifying experience for the City users allowing the organization to have a 360-degree view of each project and enabling personnel to act fast when inquiries, issues, or certain metrics thresholds are met. A console is a type of Salesforce application that's designed specifically for how OED wants their user desktop to look and contain key components related to economic development projects and information..

The Salesforce Console uses tab-based navigation creating a workspace suited for fast-paced work environments and increased productivity. Tabs help users quickly see all of the information they need on one screen with easy navigation without losing context.

Salesforce Public Sector Solutions (PSS) - The proposed solution will leverage PSS functionality for the following functionality including but not limited to portal page templates, Omniscripts, Business Rules Engine, and the Document Generation tool. Public Sector Solutions, is built on Service Cloud and the Salesforce Platform and rapidly accelerates system development time to value as the part of the system is pre-built with specific functions. PSS includes a pre-configured, specific data model and capabilities that provide a unified engagement platform that provides an end-to-end digital journey to strengthen relationships and build trust between the City and their accounts, projects and opportunities.

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2.2 Technical Responsibility Matrix

The following table defines the roles and responsibilities for the City and Accenture.

Task	City Responsibility	Accenture Responsibility
Economic Development Discovery & Configuration	• Provide business staff to provide details on requirements during discovery • Provide solution users to conduct UAT • Provide Acceptance	• Configure solution to requirements documented in the Requirements Traceability Matrix • Incorporate feedback from the City during configuration. • Deploy System to Production
User Acceptance Testing	• Provide staff to conduct UAT • Provide Acceptance • Prepare Office of Economic Development related Test Cases and Test Scripts	• Accenture will provide an estimate of City staff time for UAT daily stand ups and tools to be used • Accenture will provide Requirements Traceability Matrix to reference for the City when developing test scripts and test cases. • Incorporate Feedback
Data Migration (DM)	• • Complete Data migration templates provided by Accenture • Provide data mapping between input and Salesforce system necessary for the Data Migration activity • Prepare clean set of legacy data for data migration in data migration template provided by Accenture • Review sample data loaded in the Data Migration sandbox and provide approval. • Review and approve Data load in Production	• • Finalize the Data Migration plan based on the data and sources identified to be migrated which includes: Economic development spreadsheet • Provide Solution data model with the fields and objects (tables) to enable mapping within a csv file • Review cleaned data up to 1 round • Load clean legacy data provided by the City to Production environment. No more than 1,000 project (object) records •
Training	• Identify City staff for admin training • Access to City trainers • Training facility with computers and access to the internet	• Provide Administrator Training for up to 4 users with up to 2 sessions of 2 hours • Provide Train-the-Trainer for up to 4 trainers with up to 4 sessions of 2 hours • Provide recordings of training
Documentation	• Access to SMEs • CRM user list • City Trainers will review Training recordings	• • Data Dictionary • Training Recordings

2.3 Implementation Plan

Accenture will use our proven delivery approach to implement the Solution and help the City reach its Economic Development objectives. Our methodology is based on our experience implementing Salesforce for local governments across North America and draws from both Agile methodologies and Project Management Body of Knowledge (PMBOK) to apply a flexible yet rigorous approach.

The timely completion of a successful OED Solution implementation requires consistent oversight across all project activities. Accenture's project management framework spans the PMBOK's knowledge areas, incorporating scope, schedule, and cost tracking; integrated resource and contract management; and an enterprise approach to risk and quality used across all of our Salesforce projects. Within this management framework, we integrate Agile methodologies where projects benefit from phased approaches to address changing priorities and requirements. To support Agile's closer integration of product owners and users into development, we use structured communication approaches to maintain momentum.

We leverage the Accenture configure first approach leading to saving cost, lowering risk during and after the implementation to maintain the solution. This approach enables accelerating delivery and adoption of a Salesforce solution. Our project methodology consists of the following project milestones:

- **Kickoff** – We work with OED to define the project strategy and reach consensus on Phase 1 goals and objectives of the project.
- **Discover and Align** – We work with the City to confirm project requirements and map to the capabilities of the Salesforce Public Sector Solutions built-in functionality. Additionally, the data migration strategy is defined in coordination with the City subject matter experts.

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- **Configure and Integrate** – Our solution is based on a "Configuration First" approach. We will analyze existing OED processes and align them to the functionality provided by Salesforce. We will identify gaps and provide configuration-based best of breed solutions.
- **Test and Train** – In the Testing step, both Accenture's testing team and the City's SMEs would be heavily involved in testing the configured solution. Additionally, Training will be completed from Accenture's proven Train-the-Trainer methodology for a successful launch of the solution.
- **Deploy and Go-Live** – As an installation, we promote and migrate completed configurations and system administration requirements from testing to production environments and prepare for a successful Go-live.

Implementation Schedule - Accenture proposes an Implementation Schedule and Proposed Project Plan for the proposed system to implement the OED Solution that will support City objectives as shown in the figure below.

Schedule Jacksonville - Economic Development | Implementation Proposed Project Plan

Accenture's proposed Implementation Plan and Project Plan.

This schedule will be finalized in consultation with the City at project start. Overall, we are proposing a 19-week schedule to implement functionality and train City resources.

2.4 Proposed City Resource Plan and Project Deliverables

Role	Estimate	Activities Performed	Availability
Project Executive Sponsor	1	• Project executive oversight • Decision maker for project issues	**Recommendation: 10%** of the time for the project duration
Project Manager	1	• Project Management • Status reporting • Coordination with Department • Decision maker for project issues	**Recommendation: 50%** of the time for the project duration
System Managers & business process SMEs	3-5	• Provide expertise on department processes or technologies • Provide expertise on department processes or technologies	**Recommendation: 25%** through discovery and alignment phase and as needed for the remainder of the project

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City IT Staff	1-2	• Resolve security issues and validate compliance with IT standards • Coordinate API Integrations with existing systems • Provide expertise on department processes or technologies	Recommendation: 25% As needed, throughout the project

2.5 Project Meetings

This implementation will be coordinated through regular project management activities and reports, outlined in the table below. Meeting count assumes a 19-week delivery window; other extensions to timeline or requests for additional meetings may constitute a change in scope.

Activity	Cadence	Approx Count	Assumptions
Project Status Report	Weekly	19	Weekly meetings to review project status, risks, action items and miscellaneous project needs.
Team Check-Ins	Ad Hoc	15	Meeting cadence will vary depending on project needs, scheduled at needed
SME Touchpoint	Ad Hoc	15	Hour-long sessions with technical experts to support client activity and strategy, scheduled as needed
Steering Committee	Monthly	5	Hour long session with City stakeholders. Preparation session between City and Accenture project teams to align on content and project status.

2.6 Governance Deliverables

Standard deliverables will be made available to project stakeholders through meetings and enshrined in a shared folder via Basecamp or similar application.

Name	Cadence	Medium / Location
Project Schedule	Bi-Weekly	Meeting / Shared drive (Google or Microsoft)
Project Status Report	Weekly	Meeting (Weekly Status) / Email, shared drive (Google or Microsoft)
Risk Register	Weekly	Meeting (Weekly Status) / Shared drive (Google or Microsoft)
Issue Log	Weekly	meeting (Weekly Status) / Shared drive (Google or Microsoft)

2.7 Change Request Process

Changes to the scope of this SOW will be handled through the change order process described in this Section. A written Change Request must be prepared by the City team. Once received, Accenture will evaluate and provide a written cost and schedule impact statement to the City team within ten (10) business days. If the authorized City team designee(s) approves the cost and schedule impact it will provide written notification to Accenture. Change Requests must be mutually agreed upon by the Parties and signed by authorized representatives from both Parties to authorize implementation of the changes. Until the Change Request is agreed in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

2.8 Acceptance Criteria

Below is the criteria for deliverable acceptance.

General Conditions

- Only designated employees of the City team (or their authorized delegates) will provide acceptance of deliverables.
- The City will conduct UAT and provide acceptance for the system within ten (10) business days of the UAT period completion or as otherwise agreed upon. The user acceptance period will be specified in the project schedule.

System Acceptance

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The following elements will need to be tested before the agreed upon date for UAT completion.

- System configuration as specified in the Requirements Traceability Matrix
- Two Salesforce Dashboards and ten Reports
- Data Migration sample load

3.0 Pricing & Payment Terms

Our approach to pricing the implementation is to provide a fixed price for the system installation and configuration of the OED Solution and Salesforce solution to meet the City's functional and technical requirements.

OED Solution Implementation Services (one-time costs) - This cost includes implementation services for, discovery, configuration services, training, testing, development of integrations, and other tasks outlined in the project plan. We also include support for the cut-over and GoLive of the OED Solution on Salesforce.

3.1 Summary Pricing

The Table below outlines the summary pricing for the project.

Category	Type	Price	Notes
One Time	Accenture Professional Services	$290,488.00	
Annual Basic Maintenance & Support Services for OED	Basic support and maintenance only	$20,000.00	Payment will be made at Go-Live when support services begin
Total (One Time + Year 1 License)		$310,488.00	

3.2 Accenture - Payment Schedule

The table below provides a deliverable-based payment schedule:

Type	Milestone	Deliverable	Amount
Accenture Professional Services	Project Kickoff	Project Kickoff Meeting completed	$116,196.00
	Development Phase Complete	Final Development Phase Sprint Demo Completed	$87,146.00
	Deploy to Production and Ready for Go Live	OED Solution Production environment is ready GoLive date scheduled Managed Services enabled	$87,147.00
Annual Basic Maintenance & Support Services	Project Completion	System Go-Live	$20,000.00
Total Professional Services			$310,488.00

4.0 Key Assumptions & Considerations

The following assumptions apply to this SOW. They are in addition to other assumptions found throughout this document.

1. This proposed plan assumes OED Solution implementation without any customization provided by the Accenture implementation team and Salesforce. Accenture will work with the City to adapt requirements to the existing out-of-the-box capabilities of Salesforce to help the project stay inside

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the agreed scope of work and fixed price costs. After completion of discovery and design Accenture may need to revise the scope of how the City will use the Salesforce Platform to complete requirements without custom development or increased costs.

2. After the City obtains the Salesforce licenses as required for the project to begin, Accenture will set up the needed Salesforce sandbox and production environments for this project.
3. The proposed implementation plan assumes that these key configuration activities for the OED Solution on Salesforce are in scope:
    a. User access security
    b. Object Relationship Data Model
    c. Email from Salesforce
    d. Reports & Dashboards
    e. Data Migration of up to 1,000 Project (object) records from Office of Economic Development spreadsheet in CSV files
4. The GIS integration is out of scope for Phase 1
5. For Data Migration, Accenture assumes the City will provide the data to be migrated in Accenture Data migration template
6. SSO integration is out of scope for Phase 1
7. Web browser compatibility for Salesforce is limited to N-1 versions.
8. ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility.
9. Salesforce storage limits apply unless otherwise indicated. The City can purchase
    a. Additional cloud-based storage from Salesforce or
    b. Other third-party cloud storage providers or
    c. Use the City's existing storage solutions
10. All Salesforce general, feature, storage and license limits apply. For more details please see: https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_gov_limits.htm and https://help.salesforce.com/articleView?id=collab_files_size_limits.htm&type=5
11. All required Salesforce licenses will be purchased from Carahsoft and available for Accenture use at the project kick-off.
12. There will be a 3.5% Year-over-Year escalation for the Accenture Basic Support and Maintenance Services if those services are renewed for subsequent terms. This SOW includes a base period that begins after Phase 1 Go Live.
13. Platform security is provided by Salesforce. Relevant security plans and documentation to be provided by Salesforce.
14. Training activities as described in this response require the involvement of City resources.
15. Additional work required due to delays caused by the City's team will be managed through a Change Request process.
16. Business Process Reengineering (BPR) is not included in our implementation scope.
17. Overall project schedule relies on adherence to the UAT period in Section 2.3. Delays could result in additional costs and will be escalated to the Project Executive Sponsor.
18. The City will designate an executive sponsor(s)/decision maker(s) that will sign off on each deliverable.
19. The email address to be used within Salesforce will be supplied by the City. City must have access to the email address and change forwarding for that address.
20. Standard Objects will be used when possible, such as the Contacts object for Clients
21. Except as noted in 2.0 Scope of Services for object level security, an open sharing model will be used in Phase 1. Everyone in the system will be able to view all records.
22. Public facing Web Portal is out of scope in Phase 1.
23. Integrations with third party systems are not included in the Phase 1 implementation plan.
24. File storage of attachments and documents will use standard Salesforce file storage methods.

5.0 Period of Performance

The period of performance will be from the execution of this agreement through the agreement and contract completion date. Client and Accenture may extend the Statement of Work with mutual agreement.

6.0 Place of Performance

Work will be performed both on-site at the Client's offices and off-site.

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7.0 Points of Contact

For Accenture:

Ajay Batish, Managing Director
Accenture LLC
500 W Madison St
Chicago, IL 60661
Email: ajay.batish@accenture.com
Phone: 703.819.6028

For Client:

Authorized Signature: _____
Name: _____
Title: _____
Signature Date: _____

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Statement of Work (SOW)

Submitted to:

Software and Implementation Services for Jacksonville Human Rights Commission (JHRC) Solution

Contact: Nichole Pettway| (nichole.pettway@accenture.com)

This Statement of Work is made part of the Professional Services Agreement (hereinafter "Agreement" entered into this 29th day of July, 2024 ("Effective Date") by and between Accenture LLP (hereinafter "Accenture" or "Contractor"), a company, with its place of business at 500 W Madison St, Chicago, IL and the City of Jacksonville, FL (hereinafter "Jacksonville" or "City" or "Client"), with its place of business at XXXXX, Jacksonville, Florida.

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Note: Negotiations with the City relating to this scope of work have previously occurred with Incapsulate LLC as the contractor. As a result of an acquisition, as of May 1, 2024, Incapsulate is integrated into Accenture LLP. All current contracts, including the multi-year contract between Miami-Dade County and Incapsulate LLC, are currently in the process of being transitioned to Accenture LLP. The personnel, solution, implementation plan, and rates remain consistent with the negotiations with Incapsulate LLC: going forward, all documentation and agreements will refer to Accenture LLP as the contractor.

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1.0 Background

Accenture will be configuring and implementing an Jacksonville Human Rights Commission Solution, hereinafter referred to as the "JHRC Solution", to meet the City of Jacksonville's Human Rights Commission (JHRC) requirements to prevent or eliminate discrimination in Jacksonville through the capture of complaints from the public that are investigated and evaluated for resolution.

2.0 Scope of Services

This will be a Firm Fixed Price Project and the Purchase Order from the City will be delivered after execution of the Agreement by both parties. The overall purpose of this project is to implement the Salesforce solution for the JHRC.

The implementation will include, in addition to ongoing project and program management the following activities:

- Salesforce Org setup
- Training - minimal training time included due to JHRC being involved during Development and UAT
- 1 Production org and multiple sandbox environments will be configured
- Accenture will Configure 3 User Profile and 5 Permission Sets to manage field and object level security
- Standard Configuration of Complaint Management for a single workflow for EOEA, Employment and Housing complaints.
- Build relationship data model with standard
- Salesforce objects and newly configured objects to manage JHRC records for Complaints, Contacts and Investigations. (up to a total of 5 newly configured objects)
- New fields on objects to capture the metadata required by JHRC (up to 10 newly configured fields per object)
- Ability to send and receive email from Salesforce to Complaint Contacts
- Activity tracking of complaint management and investigations
- Reports and Dashboard - Up to 2 Dashboards with 4 reports per Dashboard
- Configure up to 7 List views for Users to manage workload
- 10 Email Templates
- Up to 5 Validation Rules to enforce clean data

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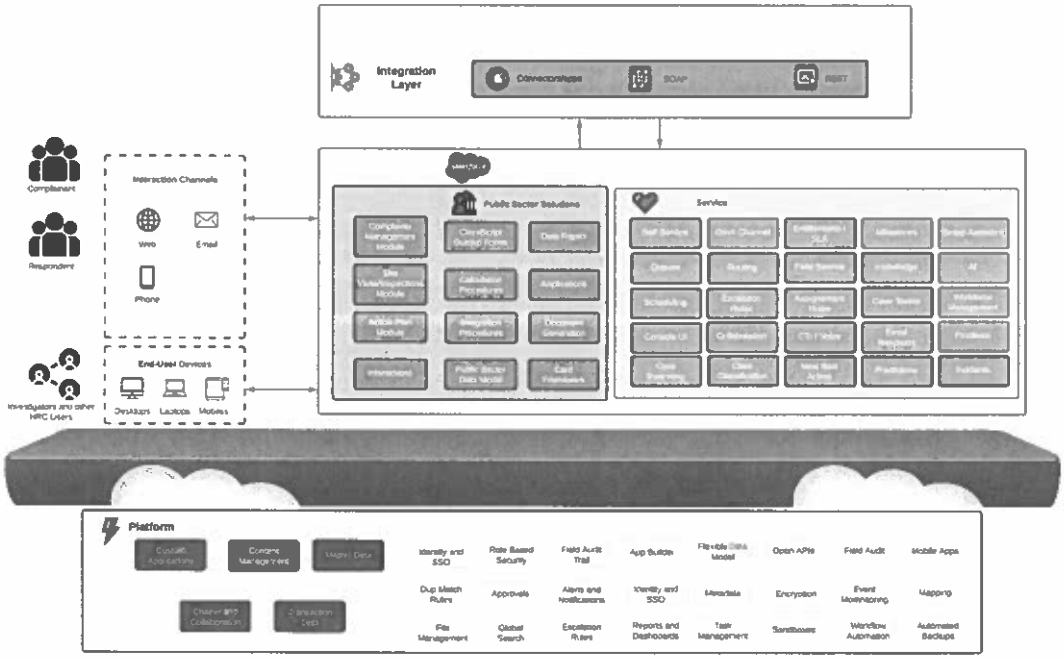
2.1 Solution Overview



Accenture's proposed solution and the Salesforce platform include the following industry-specific capabilities.

Salesforce Data Models - The proposed solution will leverage the standard Salesforce data model for the following functionality including but not limited to Contacts, Complaints, Users, and Tasks. The proposed solution leverages the Salesforce Public Sector Solutions (PSS) data model for the following system functionality including but not limited to Complaints, Applications, Permits, Violations and Enforcement, Visits and Inspections. See Public Sector Solutions Admin Guide for Data Model Overview for Public Sector Solutions Standard Objects.

Salesforce Platform - The proposed JHRC solution will leverage core Salesforce functionality for the following functionality including but not limited to Email Templates, Email Alerts, Flows, Queues, Assignment Rules, Files, Approval Processes, Record Types, Record Pages, standard permissioning and User management. The Salesforce Lightning Console is a unifying experience for the JHRC users allowing the organization to have a 360-degree view of each complaint and enabling personnel to manage the investigation and resolution of each complaint. A console is a type of Salesforce application that's designed specifically for how JHRC wants their user desktop to look and contain key components related to discrimination complaints and contact information.

The Salesforce Console uses tab-based navigation creating a workspace suited for fast-paced work environments and increased productivity. Tabs help users quickly see all of the information they need on one screen with easy navigation without losing context.

Salesforce Public Sector Solutions (PSS) - The proposed solution will leverage PSS functionality for the following functionality including but not limited to complaints management, Omniscripts, and Business Rules Enginel. Public Sector Solutions, is built on Service Cloud and the Salesforce Platform and rapidly accelerates system development time to value as the part of the system is pre-built with specific functions. PSS includes a pre-configured, specific data model and capabilities that provide a unified engagement platform that provides an end-to-end digital journey to strengthen relationships and build trust between the City and their citizens who have discrimination complaints.

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2.2 Technical Responsibility Matrix

The following table defines the roles and responsibilities for the City and Accenture.

Task	City Responsibility	Accenture Responsibility
JHRC Discovery & Configuration	• Provide business staff to provide details on requirements during discovery • Provide solution users to conduct UAT • Provide Acceptance	• Configure solution to requirements documented in the Requirements Traceability Matrix • Incorporate feedback from the City during configuration. • Deploy System to Production
User Acceptance Testing	• Provide staff to conduct UAT • Provide Acceptance • Prepare JHRC related Test Cases and Test Scripts	• Accenture will provide an estimate of City staff time for UAT daily stand ups and tools to be used • Accenture will provide Requirements Traceability Matrix to reference for the City when developing test scripts and test cases. • Incorporate Feedback
Training	• Identify City staff for admin training • Access to City users • Training facility with computers and access to the internet	• Provide Administrator Training for up to 4 users with up to 2 sessions of 2 hours • Provide End User training for up to 4 sessions of 2 hours • Provide recordings of training
Documentation	• Access to SMEs • City Trainers will review Training recordings	• Data Dictionary • Training Recordings

2.3 Implementation Plan

Accenture will use our proven delivery approach to implement the Solution and help the City reach its JHRC objectives. Our methodology is based on our experience implementing Salesforce for local governments across North America and draws from both Agile methodologies and Project Management Body of Knowledge (PMBOK) to apply a flexible yet rigorous approach.

The timely completion of a successful JHRC Solution implementation requires consistent oversight across all project activities. Accenture's project management framework spans the PMBOK's knowledge areas, incorporating scope, schedule, and cost tracking; integrated resource and contract management; and an enterprise approach to risk and quality used across all of our Salesforce projects. Within this management framework, we integrate Agile methodologies where projects benefit from phased approaches to address changing priorities and requirements. To support Agile's closer integration of product owners and users into development, we use structured communication approaches to maintain momentum.

We leverage the Accenture configure first approach leading to saving cost, lowering risk during and after the implementation to maintain the solution. This approach enables accelerating delivery and adoption of a Salesforce solution. Our project methodology consists of the following project milestones:

- **Kickoff** – We work with JHRC to define the project strategy and reach consensus on Phase 1 goals and objectives of the project.
- **Discover and Align** – We work with the City to confirm project requirements and map to the capabilities of the Salesforce Public Sector Solutions built-in functionality.
- **Configure and Integrate** – Our solution is based on a "Configuration First" approach. We will analyze existing JHRC processes and align them to the functionality provided by Salesforce. We will identify gaps and provide configuration-based best of breed solutions.

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- **Test and Train** – In the Testing step, both Accenture's testing team and the City's SMEs would be heavily involved in testing the configured solution. Additionally, Training will be completed from Accenture's proven Train-the-Trainer methodology for a successful launch of the solution.
- **Deploy and Go-Live** – As an installation, we promote and migrate completed configurations and system administration requirements from testing to production environments and prepare for a successful Go-live.

Implementation Schedule - Accenture proposes an Implementation Schedule and Proposed Project Plan for the proposed system to implement the JHRC Solution that will support City objectives as shown in the figure below.

JHRC | Project Implementation Schedule

Accenture's proposed Implementation Plan and Project Plan

This schedule will be finalized in consultation with the City at project start. Overall, we are proposing a 12-week schedule to implement functionality and train JHRC resources.

2.4 Proposed City Resource Plan and Project Deliverables

Role	Estimate	Activities Performed	Availability
Project Executive Sponsor	1	• Project executive oversight • Decision maker for project issues	**Recommendation: 10%** of the time for the project duration
Project Manager	1	• Project Management • Status reporting • Coordination with Department • Decision maker for project issues	**Recommendation: 50%** of the time for the project duration
System Managers & business process SMEs	3	• Provide expertise on department processes or technologies • Provide expertise on department processes or technologies	**Recommendation: 25%** through discovery and alignment phase and as needed for the remainder of the project

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City IT Staff	2	• Resolve security issues and validate compliance with IT standards • Coordinate API Integrations with existing systems • Provide expertise on department processes or technologies	**Recommendation: 25%** As needed, throughout the project

2.5 Project Meetings

This implementation will be coordinated through regular project management activities and reports, outlined in the table below. Meeting count assumes a 10-week delivery window; other extensions to timeline or requests for additional meetings may constitute a change in scope.

Activity	Cadence	Approx Count	Assumptions
Project Status Report	Weekly	10	Weekly meetings to review project status, risks, action items and miscellaneous project needs.
Team Check-Ins	Ad Hoc	10	Meeting cadence will vary depending on project needs, scheduled at needed
SME Touchpoint	Ad Hoc	10	Hour-long sessions with technical experts to support client activity and strategy, scheduled as needed
Steering Committee	Monthly	2	Hour long session with City stakeholders. Preparation session between City and Accenture project teams to align on content and project status.

2.6 Governance Deliverables

Standard deliverables will be made available to project stakeholders through meetings and enshrined in a shared folder via Basecamp or similar application.

Name	Cadence	Medium / Location
Project Schedule	Bi-Weekly	Meeting / Shared drive (Google or Microsoft)
Project Status Report	Weekly	Meeting (Weekly Status) / Email, shared drive (Google or Microsoft)
Risk Register	Weekly	Meeting (Weekly Status) / Shared drive (Google or Microsoft)
Issue Log	Weekly	Meeting (Weekly Status) / Shared drive (Google or Microsoft)

2.7 Change Request Process

Changes to the scope of this SOW will be handled through the change order process described in this Section. A written Change Request must be prepared by the City team. Once received, Accenture will evaluate and provide a written cost and schedule impact statement to the City team within ten (10) business days. If the authorized City team designee(s) approves the cost and schedule impact it will provide written notification to Accenture. Change Requests must be mutually agreed upon by the Parties and signed by authorized representatives from both Parties to authorize implementation of the changes. Until the Change Request is agreed in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

2.8 Acceptance Criteria

Below are the criteria for deliverable acceptance.

General Conditions

- Only designated employees of the City team (or their authorized delegates) will provide acceptance of deliverables.
- The City will conduct UAT and provide acceptance for the system within three (3) business days of the UAT period completion or as otherwise agreed upon. The user acceptance period will be specified in the project schedule.

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System Acceptance

The following elements will need to be tested before the agreed upon date for UAT completion.

- System configuration as specified in the Requirements Traceability Matrix

3.0 Pricing & Payment Terms

Our approach to pricing the implementation is to provide a fixed price for the system installation and configuration of the JHRC Solution and Salesforce solution to meet the City's functional and technical requirements.

JHRC Solution Implementation Services (one-time costs) - This cost includes implementation services for, discovery, configuration services, training, testing, development of integrations, and other tasks outlined in the project plan. We also include support for the cut-over and GoLive of the JHRC Solution on Salesforce.

3.1 Summary Pricing

The Table below outlines the summary pricing for the project.

Category	Type	Price	Notes
One Time	Accenture Professional Services	$188,000	
Total (One Time Costs)		$188,000	

3.2 Accenture - Payment Schedule

The table below provides a deliverable-based payment schedule:

Type	Milestone	Deliverable	Amount
Accenture Professional Services	Project Kickoff	Project Kickoff Meeting completed	$88,000.00
	Development Phase Complete	Final Development Phase Sprint Demo Completed	$50,000.00
	Deploy to Production and Ready for Go Live	JHRC Solution Production environment is ready GoLive date scheduled Managed Services enabled	$50,000.00
Total Professional Services			

4.0 Key Assumptions & Considerations

The following assumptions apply to this SOW. They are in addition to other assumptions found throughout this document.

1. This proposed plan assumes JHRC Solution implementation without any customization provided by the Accenture implementation team and Salesforce. Accenture will work with the City to adapt requirements to the existing out-of-the-box capabilities of Salesforce to help the project stay inside the agreed scope of work and fixed price costs. After completion of discovery and design Accenture may need to revise the scope of how the City will use the Salesforce Platform to complete requirements without custom development or increased costs.
2. Role: Admin, Analyst, Investigator, Manager
3. City of Jacksonville SSO
4. Page Layouts (3)
5. Custom fields for Standard objects: up to 10 custom fields
6. 5 Validation rules
7. 5 newly configured Objects
8. 4 Record Types based on types of complaints

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9. All categories of complaints must align to a single workflow. EOEA, Employment and Housing Complaints will use the same workflow within Salesforce Complaints Management module leveraging configuration to meet requirements.
10. No Portal for phase 1
11. Up to 2 Dashboards beyond OOTB
12. Up to 8 Reports beyond OOTB
13. No integration with MyJax for Complaint form intake (integration to be developed during MyJax project, post-JHRC go-live)
14. No GIS integration
15. No Document Generation automation from Salesforce within scope
16. No eSignature in scope
17. No integration with HEMS
18. No data migration
19. ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility.
20. Salesforce storage limits apply unless otherwise indicated. The City can purchase
    a. Additional cloud-based storage from Salesforce or
    b. Other third-party cloud storage providers or
    c. Use the City's existing storage solutions
21. All Salesforce general, feature, storage and license limits apply. For more details please see: https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_gov_limits.htm and https://help.salesforce.com/articleView?id=collab_files_size_limits.htm&type=5
22. All required Salesforce licenses will be purchased from Carahsoft and available for Accenture use at the project kick-off.
23. There will be a 3.5% Year-over-Year escalation for the Accenture Basic Support and Maintenance Services if those services are renewed for subsequent terms. This SOW includes a base period that begins after Go Live.
24. Platform security is provided by Salesforce. Relevant security plans and documentation to be provided by Salesforce.
25. Training activities as described in this response require the involvement of City resources.
26. Additional work required due to delays caused by the City's team will be managed through a Change Request process.
27. Business Process Reengineering (BPR) is not included in our implementation scope.
28. Overall project schedule relies on adherence to the UAT period in Section 2.3. Delays could result in additional costs and will be escalated to the Project Executive Sponsor.
29. The City will designate an executive sponsor(s)/decision maker(s) that will sign off on each deliverable.
30. The email address to be used within Salesforce to send and receive emails will be supplied by the City. City must have access to the email address and change forwarding for that address.
31. Standard Objects will be used when possible, such as the Contacts object for Clients
32. Integrations with third party systems are not included in the Phase 1 implementation plan.
33. File storage of attachments and documents will use standard Salesforce file storage methods.

5.0 Period of Performance

The period of performance will be from the execution of this agreement through the agreement and project completion date. Client and Accenture may extend the Statement of Work with mutual agreement.

6.0 Place of Performance

Work will be performed both on-site at the Client's offices and off-site.

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7.0 Points of Contact

For Accenture:

Ajay Batish, Managing Director
Accenture LLC
500 W Madison St
Chicago, IL 60661
Email: ajay.batish@accenture.com
Phone: 703.819.6028

For Client:

Authorized Signature: _____
Name: _____
Title: _____
Signature Date: _____

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Miami-Dade Customer Relationship Management Solution
Contract No. RFP-01690

THIS AGREEMENT for the provision of a Customer Relationship Management Solution (the "Agreement"), made and entered by and between Incapsulate, LLC, a Delaware limited liability company, having its principal office at 650 Massachusetts Ave NW, Suite 600, Washington, D.C. 20001 (the "Contractor"), and Miami- Dade County, a political subdivision of the State of Florida, having its principal office at 111 NW 1st Street, Miami, Florida 33128 (the "County" or "Subscriber").

WITNESSETH:

WHEREAS, the Contractor has offered to provide a Customer Relationship Management Solution ("Solution"), on a non-exclusive basis, that shall conform to the Scope of Services (see Appendix A), Request for Proposals ("RFP") No. RFP-01690 and all associated addenda and attachments, incorporated herein by reference, and the requirements of this Agreement; and

WHEREAS, the Contractor has submitted a written proposal dated April 15, 2021 (the "Contractor's Proposal") which is incorporated herein by reference; and

WHEREAS, the County desires to procure from the Contractor such Solution for the County, in accordance with the terms and conditions of this Agreement,

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties hereto agree as follows:

ARTICLE 1. DEFINITIONS

The following words and expressions used in this Agreement shall be construed as follows, except when it is clear from the context that another meaning is intended:

1.1 The word "**Acceptance**" to mean County's approval of a milestone in accordance with Attachment D1 (Acceptance Form).

1.2 The words "**Anypoint Management**" to mean the use and administration of the Mulesoft Anypoint integration software.

1.3 The words "**Anypoint Platform**" to mean a hybrid integration platform that creates an application network of app, data and devices by producing and consuming reusable assets.

1.4 The words "**Article**" or "**Articles**" to mean the terms and conditions delineated in this Agreement.

1.5 The word "**Availability**" to mean when the Subcontractor software as a service platform is operating without downtime. This is measured as a percentage as stated in Appendix C (Subcontractor Service Level Agreement) of this document.

1.6 The words "**Business Owner(s)**" to mean the representatives of the Communications and Customer Experience Department or other applicable County department that are accountable for the operational functions of 311.

1.7 The word "**Capsule**" to mean a managed package provided by the Contractor to support 311 operations on the Subcontractor platform.

1.8 The words "**Capsule Agent Console**" to mean the user interface designed specifically by the Contractor on the Subcontractor platform for County staff to use during all interactions with citizens and the public on the phone, in person, or via other channels to capture key information for service requests, provide answers to questions, update and resolve the service requests submitted.

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1.9 The words "**Confidential Information**" to mean collectively: (a) the trade secrets of a Discloser; (b) information that Discloser has kept confidential; (c) information that Discloser is obligated to keep confidential to some extent by law; and (d) information that a third party has provided to Discloser under an obligation of confidentiality.

1.10 The words "**Contract**" to mean these (i) Articles, (ii) Scope of Services, (iii) Price and Payment Schedule, (iv) all other appendices and attachments hereto, and (v) all amendments issued hereto.

1.11 The words "**Contract Date**" to mean the date on which this Agreement is effective.

1.12 The words "**Contract Manager**" to mean Miami-Dade County's Director, Internal Services Department, or the duly authorized representative designated to manage the Contract.

1.13 The word "**Contractor**" to mean Incapsulate, LLC and its permitted successors.

1.14 The words "**County Data**" to mean all electronic data or information submitted by Subscriber as part of Subscriber's use of the Software.

1.15 The word "**Days**" to mean calendar days.

1.16 The word "**Deliverable(s)**" shall mean all Licensed Software and Documentation, as defined below, to be delivered or made available by the Contractor for use by the County, whether on site or remotely accessed, and all Services to be performed for and provided to the County by the Contractor under the Agreement.

1.17 The words "**Deployment Completion Document**" to mean documentation and report of all the out-of-the-box and custom components deployed to production to support the Solution.

1.18 The words "**Deployment Plan**" to mean the documentation of goals, timeline, and approach for implementing Project Deliverables.

1.19 The word "**Discloser**" to mean the Party that discloses, transmits or allows access to Confidential Information to Recipient.

1.20 The word "**Documentation**" shall mean all manuals, user documentation, and other related materials pertaining to the Solution which are furnished to the County by Contractor in connection with the Licensed Software.

1.21 The words "**ESRI Connector**" to mean the components within the capsule built on the salesforce platform to support the integration with the County's ESRI GIS system.

1.22 The words "**Extra Work**" or "**Additional Work**" to mean additions or deletions or modifications to the amount, type or value of the Work and Services as required in this Contract, as directed and/or approved by the County.

1.23 The words "**Final Acceptance**" to mean the County's written approval, upon successful completion of the Reliability Period, stating that all components of the Scope of Services have been performed and the Solution functionality is fully operable and in conformance with the Scope of Services of this Agreement.

1.24 The words "**Go-Live**" to mean the County's use of the Solution in a production environment with business being transacted in the Solution.

1.25 The words "**Implementation Timeline**" to mean the thirty-two week period as may be modified or amended, for the completion of those tasks as further delineated in Article 8 and Appendix A, 2.4 (Scope of Work).

1.26 The words "**Implementation Workbook**" to mean a Contractor provided document used to collect County specific information required to configure the Capsule to the County's needs. The different components of the document include (but not limited to) County branding information, ESRI information, file management, etc.

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1.27 The words "**Intellectual Property**" to mean Contractor's inventions that have legal protections in the following forms: 1. Trade secret 2. Patent 3. Trademark.

1.28 The words "**Knowledge Articles**" to mean a Subcontractor Component used to document information that describes a process, workflow, or that contains instructions to help Users find the information they need from multiple sources.

1.29 The words "**Knowledge Content**" to mean the collection of information, links or related documents related to a Knowledge article that the County has and needs to migrate to the Subcontractor Platform.

1.30 The words "**Licensed Software**" to mean the commercially available programs, programming language, and data in machine readable code licensed by the Contractor to the County. Licensed Software includes, in particular, the items listed in the Appendix D (Payment Schedule), Section 2 (Solution Subscription License and Support Cost Breakdown).

1.31 The word "**Maintenance**" shall mean any activity intended to eliminate faults, to improve or to keep the Solution in satisfactory working condition, including tests, measurements, adjustments, changes, modifications, enhancements or repairs, and updates.

1.32 The word "**MuleSoft**" to mean the integration platform used to connect data, devices, and applications in cloud computing environment.

1.33 The words "**Notice to Proceed**" or "**NTP**" to mean the provision of a purchase order by the County to the Contractor which shall constitute the County's authorization for Services to begin under this Agreement and the initiation of the Implementation Timeline.

1.34 The word "**Org**" or "**Realm**" or "**Tenant**" to mean a unique instance of the applicable Services, i.e., a separate set of County Data and County-specific Service customizations held by Subcontractor in a logically separated database (i.e., a database segregated through password-controlled access).

1.35 The words "**Project Manager**" to mean the County Mayor or the duly authorized representative designated to manage the Project.

1.36 The words "**Project Status Report**" to mean a report in the form of a presentation that is used to present high level information about the current (point in time) status of the project progress, risks, and action items.

1.37 The word "**Recipient**" to mean the Party receiving Confidential Information.

1.38 The word "**Releases**" shall mean those versions of the Licensed Software which add functionality to the Licensed Software, including any Updates and Upgrades provided under this Agreement.

1.39 The words "**Sandbox Strategy**" to mean a document that includes a plan that defines the sandbox type and information flow based on the project development life cycle.

1.40 The words "**Scope of Work**" to mean the document appended hereto as Appendix A, which details the Work to be performed by the Contractor.

1.40 The word "**Services**" to mean project management, timeline, configuration, customization, implementation, escrow, training, maintenance and technical support services required to be done by the Contractor.

1.41 The word "**Solution**" to mean the total complement of Licensed Software, Services, Programs, Customizations, developed works, and all other items, tangible and intangible, designed to operate as an integrated group in order to provide the functionality outlined in the Scope of Services.

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1.42 The word **"Subcontractor"** or **"Subconsultant"** to mean any person, entity, firm or corporation, other than the employees of the Contractor, who furnishes labor and/or materials including but not limited to Licensed Software, Maintenance, or Technical Support Services either as a manufacturer, proprietary owner, reseller, or distributor, in connection with the Work, whether directly or indirectly, on behalf and/or under the direction of the Contractor and whether or not in privity of contract with the Contractor. All Subcontractors shall be bound by the provisions of Article 33 (Subcontractual Relations).

1.43 The word **"Subscription"** to mean the license as purchased to use the Licensed Software.

1.44 The word **"Subscription Term"** to mean the term of the Subscription purchased by the County. Subscription Term renewal shall occur in accordance with Article 7.6.

1.45 The words **"Successor Product"** to mean, with respect to the Licensed Software, a new software based on the same core technology that has substantially similar features and functionality.

1.46 The word **"Super User"** to mean users who have a basic understanding of Solution administration with a particular focus on the following service request configuration, reporting using Subcontractor reporting and dashboarding capabilities, and user administration.

1.47 The words **"Technical Support Services"** to mean those services outlined in Appendix A which the Contractor provides to the County in order to ensure optimal performance of the Solution, include all components thereof.

1.48 The words **"Third Party Users"** shall mean those individuals or entities authorized by the County to perform services, access the Solution, review information, and make inquiries.

1.49 The word **"Updates"** shall mean periodic releases of the Licensed Software that may contain fixes or incremental enhancements to the Licensed Software and are included in Maintenance.

1.50 The word **"Upgrades"** shall mean periodic releases of the Licensed Software that contain significant enhancements that may include changes necessary to accommodate changes in the hardware platform, database platform, operating system or major changes in capability and functionality.

1.51 The word **"User"** to mean users that have had end user training on how to use the Solution to create service requests, service request management and activities, knowledge search, contact search and basic 311 or department functions to use the Solution.

1.52 The words **"User Acceptance Testing"** to mean the testing performed by the County to verify/accept the software system before moving the software application to the production environment.

1.53 The words **"Work"** to mean all matters and things required to be done by the Contractor in accordance with the provisions of this Contract.

ARTICLE 2. ORDER OF PRECEDENCE

If there is a conflict between or among the provisions of this Agreement, the order of precedence is as follows: 1) Article 1 to Article 63; 2) Appendix A (Scope of Work); 3) Appendix B (Product Special Terms); 4) Appendix C (Subcontractor Service Level Agreement); 5) Appendix D (Payment Schedule); and 6) any other appendixes and attachments. This Agreement shall supersede any "click-through" terms and conditions that may be imbedded in the License Software. For the avoidance of doubt, the terms and provisions of Article 1 through Article 63 shall supersede all conflicting appendices and/or attachments.

ARTICLE 3. RULES OF INTERPRETATION

3.1 References to a specified Article, section or schedule shall be construed as reference to that specified Article, or section of, or schedule to this Agreement unless otherwise indicated.

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3.2 Reference to any agreement or other instrument shall be deemed to include such agreement or other instrument as such agreement or other instrument may, from time to time, be modified, amended, supplemented, or restated in accordance with its terms.

3.3 The terms "hereof", "herein", "hereinafter", "hereby", "herewith", "hereto", and "hereunder" shall be deemed to refer to this Agreement.

3.4 The terms "directed", "required", "permitted", "ordered", "designated", "selected", "prescribed" or words of like import to mean respectively, the direction, requirement, permission, order, designation, selection or prescription of the Project Manager.

3.5 The terms "approved", acceptable", "satisfactory", "equal", "necessary", or words of like import to mean respectively, approved by, or acceptable or satisfactory to, equal or necessary in the opinion of the Project Manager.

3.6 The titles, headings, captions, and arrangements used in these Terms and Conditions are for convenience only and shall not be deemed to limit, amplify, or modify the terms of this Contract, nor affect the meaning thereof.

ARTICLE 4. NATURE OF THE AGREEMENT

4.1 This Agreement incorporates and includes all prior negotiations, correspondence, conversations, agreements, and understandings applicable to the matters contained in this Agreement. The Parties agree that there are no commitments, agreements, or understandings concerning the subject matter of this Agreement that are not contained in this Agreement, and that this Agreement contains the entire agreement between the Parties as to all matters contained herein. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written. It is further agreed that any oral representations or modifications concerning this Agreement shall be of no force or effect, and that this Agreement may be modified, altered, or amended only by a written amendment duly executed by the Parties hereto or their authorized representatives.

4.2 The Contractor shall provide the services set forth in the Scope of Services and render full and prompt cooperation with the County in all aspects of the Work performed hereunder.

4.3 The Contractor acknowledges that this Agreement requires the performance of all things necessary for or incidental to the effective and complete performance of all Work under this Contract. All things not expressly mentioned in this Agreement but necessary to carrying out its intent are required by this Agreement, and the Contractor shall perform the same as though they were specifically mentioned, described, and delineated.

4.4 The Contractor shall furnish all labor, materials, tools, supplies, and other items required to perform the Work necessary for the completion of this Contract. All Work shall be accomplished at the direction of and to the satisfaction of the Project Manager.

4.5 The Contractor acknowledges that the County shall make all policy decisions regarding the Scope of Services. The Contractor agrees to provide input on policy issues in the form of recommendations. The Contractor shall implement all changes in providing Services hereunder as a result of a policy change implemented by the County. The Contractor agrees to act in an expeditious and fiscally sound manner in providing the County with input regarding the time and cost to implement said changes and in executing the activities required to implement said changes.

ARTICLE 5. CONTRACT TERM

The Contract shall become effective on the Contract Date which shall be the date of the County Mayor's or Mayor's Designee's signature and shall continue through the last day of the sixtieth (60th) month. The County, at its sole discretion, reserves the right to exercise the option to renew this Agreement for one (1) additional five (5) year period. The County reserves the right to exercise its option to extend this Contract for up to one hundred-eighty (180) calendar days beyond the current Contract period and will notify the Contractor in writing of the extension. The County agrees to continue to remit prorated payment for any use of the Solution for the time period of the extension. This Contract may be extended beyond the initial one hundred-eighty (180) calendar day extension period by mutual agreement between the County and the Contractor, upon approval by the Board of County Commissioners (the

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"Board').

ARTICLE 6. DELIVERY

6.1 Delivery of the Solution shall be according to Appendix A (Scope of Services) and contingent upon Final Acceptance by the County.

6.2 Documentation. The Contractor shall provide electronic copies of the associated Documentation as provided by the developer(s) of the Solution to the County upon Final Acceptance.

ARTICLE 7. GRANT OF LICENSE

7.1 License. Contractor grants to the County a non-transferable, non-exclusive license, subject to the Terms of this Agreement, for the term of the Agreement, to use the Licensed Software. Under no circumstances shall County be entitled to receive the source code to the Licensed Software, even if in case of a breach by Contractor. This license is limited; no other uses of the Licensed Software are implied. License to the Subcontractor Services is described in Appendix B and Attachment 10 to this Agreement.

7.2 Limitation on License

(1) The County may not sublicense or rent the Licensed Software to others.

(2) The County may use the Licensed Software only in connection with providing its 311/CRM-related services.

(3) The County may not use the Licensed Software to provide consulting services to third parties.

(4) The County may not decompile, reverse engineer, disassemble, transfer, distribute, resell, assign, sublicense, commercially exploit, or otherwise use the Licensed Software to create any derivative works.

(5) The County may not use any network monitoring or discovery software to determine the architecture of the Licensed Software.

(6) The County may not use any robot, spider, or other automatic software or device, or manual process to monitor or copy the Software.

(7) The County may not use any aspect of the Licensed Software to create similar software or services.

(8) The County may not interfere with or disrupt the integrity or performance of the Licensed Software.

(9) The Parties agree that the Agreement constitutes a license, not a sale, of the Licensed Software. Any attempt by the County to transfer the license in the Licensed Software, except as expressly permitted in writing by County, shall result in immediate termination of this Agreement.

7.3 Intellectual Property Ownership. The Licensed Software shall remain the exclusive Intellectual Property of Contractor. The County does not acquire any ownership in the Licensed Software because of this Agreement. Subscriber acknowledges, shall not challenge, and shall not voluntarily aid any third party in challenging Contractor's Intellectual Property of the Software. Per the license, the County can only use the Licensed Software within Miami-Dade County but cannot reassign, transfer, or resell outside.

7.4 Use by County's Contractors. The County's contractors may exercise on the County's behalf, of the County's entire license rights to the Licensed Software, provided that (i) the entire use of the Licensed Software by County's employees and contractors remains within the parameters stated in the Agreement, (ii) those contractors agree to not further disclose, transfer or allow access to the Licensed Software to third parties, (iii) such contractor usage is solely for the County's purposes, and (iv) the contractors abide by the limitations in Article 43 (Confidentiality). The County shall be liable for any breach of this Agreement by its contractors.

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7.5 County Responsibilities

A. The County's Computer Environment. The County is solely responsible for the quality and maintenance of the computing environment from which it will access the Licensed Software.

B. Subcontractor. The County is responsible for licensing Subcontractor software sufficient to interface with the Capsule and with the same number of seats as required under the license.

C. Internet Browser Compatibility. Contractor shall ensure that the Licensed Software is usable with Internet browsers that are compatible with Subcontractor.

D. File Conversion. Contractor is not responsible for converting the County's data files for use with the Licensed Software.

E. Data. Contractor is solely responsible for the accuracy, completeness, and integrity of all data that it submits to or derives from the Licensed Software.

7.6 The license to the Solution shall be on a yearly subscription basis (the "Subscription") which shall renew each year on the anniversary date of receipt of a proper invoice for Milestone 1b in accordance with Article 22 (Method and Times of Payment) and outlined in Appendix D (Payment Schedule) (the "Subscription Term") throughout the initial Contract Term. Should the County, in its sole discretion, opt to exercise its option to renew in accordance with Article 5 (Contract Term) the Subscription Term shall continue be renewed on the annual anniversary date. Each annual Subscription shall be priced as specified in Appendix D (Payment Schedule).

7.7 The Subscription or Subscription Term renewal is not contingent on Contractor including future functionality or features with the Solution and is not entered into in reliance on any promise or representation by Contractor or its agents concerning any future functionality or features of the Solution except as otherwise required by this Agreement.

ARTICLE 8. IMPLEMENTATION SERVICES

8.1 If the Contractor fails to provide Deliverables, Solution, Updates, or Upgrades within the time specified or if the Solution delivered fails to conform to the requirements or are found to be defective in material or workmanship, then the County may (i) reject the Deliverable, Solution, Update, or Upgrade in totality or (ii) accept any portion of Deliverable, Solution, Update, or Upgrade and reject the balance of the Deliverable, Solution, Update, or Upgrade. The County shall notify Contractor of such rejection in writing and specify in such notice, the reasons for such rejection. Contractor agrees to deliver a fix or updated Deliverable, Solution, Update, or Upgrade within a mutually agreed upon time period following the Contractor's receipt of the County's rejection notice.

8.2 The Contractor shall bear the risk of loss or damage to the Deliverable, Solution, Update, or Upgrade until the time the Project Manager certifies that the Deliverable, Solution, Update, or Upgrade has successfully completed the acceptance testing whether such loss or damage crises from acts or omissions (whether negligent or not) of the Contractor or the County or from any other cause whatsoever, except loss or damage arising solely from the gross negligence or willful acts of the County.

8.3 The Contractor agrees to install the Solution in accordance with Appendix A (Scope of Work). Contractor agrees to commence installation of the Solution according to Section 2.4 of Appendix A (Scope of Work) unless a different time for implementation is otherwise mutually agreed upon by the parties hereto. All implementation services will be performed during normal business hours. Whenever possible, however some services to be provided may be required outside of normal business hours to accommodate County operations. Work to be performed outside normal business hours will be mutually agreed by both parties. Contractor shall diligently pursue and complete such implementation services without interruption and in accordance with the Implementation Timeline, so that such Solution is in good working order and ready for use by the dates set forth in the Timeline.

8.4 Contractor agrees to do all things necessary for proper implementation of the Solution and to perform its implementation obligations hereunder in an orderly, skillful and expeditious manner, with sufficient labor and materials to ensure efficient and timely completion of such obligations. If applicable, Contractor shall coordinate with the Project Manager all Work with all other contractors and/or County personnel performing work to complete Solution installation. The County shall be responsible for resolving all disputes relating to site access between Contractor and/or County personnel. Contractor shall provide all materials

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necessary to properly implement the Solution. The County shall attempt to provide reasonable working and secure storage space for the performance by Contractor of the implementation services described herein.

8.5 Unless otherwise agreed to by the County, Contractor agrees as part of the implementation to perform all required Work to successfully achieve all objectives set forth in the Scope of Services, including, but not limited to, (a) solution configuration; (b) interface development; (c) software testing; (d) acceptance and user acceptance testing; (e) training; (f) cooperating with all other contractors that are supplying peripheral or ancillary equipment required for the use of the Solution; and (g) any additional services necessary to ensure Contractor's compliance with this Article 8.

8.6 Solution testing shall consist of the tests described in the Scope of Services which are to be conducted collectively by the Contractor and the County. The purpose of these tests is to demonstrate the complete operability of the Solution in conformance with the requirements of the Contract. This will include an actual demonstration of all required Solution functionality. All tests shall be in accordance with test plans and procedures prepared by Contractor and previously approved by the County. In the event of any outstanding deficiencies at the conclusion of installation testing, as determined by the County, Contractor shall be responsible for instituting necessary corrective measures, and for subsequently satisfactorily demonstrating and/or re-demonstrating Solution performance.

ARTICLE 9. TESTS

The Contractor shall configure and program the Solution to conform to the Scope of Services. The Solution shall be subject to numerous tests, including acceptance testing as further defined in the Scope of Services as developed and agreed by both parties. To assure Solution performance, the County's Project Manager will coordinate all testing of the Solution and provide Final Acceptance upon completion of all milestones and deliverables as outlined in the Scope of Services.

Failure of the Solution to satisfy the acceptance criteria and conform to the requirements set forth in the Scope of Services by the timeframes set forth in the Implementation Timeline may result in the County withholding payment until satisfactory acceptance is granted to the Contractor.

After Final Acceptance is granted, any modifications, fixes, enhancements, and/or new releases of the Solution require separate testing periods and sign-off from the Project Manager prior to Go- Live via mutually agreed upon acceptance testing process.

ARTICLE 10. EXTENSION OF TIME

10.1 If the Contractor is delayed at any time hereunder due to any of the following then the affected schedule or the required performance of Work may be extended by the County in the reasonable exercise of its discretion for such reasonable time as the County may determine, subject to the following conditions:

i. The cause of the delay is beyond the Contractor's control and arises without its fault or negligence, and arises after the execution hereof and neither was nor could have been anticipated by the Contractor by reasonable investigation; and

ii. The completion of the Work will be actually and necessarily delayed by the causes set forth in "i" above; and the effect of such cause cannot be avoided or mitigated by the exercise of all reasonable precautions, efforts and measures whether before or after the occurrence of the cause of delay; and

iii. The effect of such cause cannot be avoided or mitigated by the exercise of all reasonable precautions, efforts and measures whether before or after the occurrence of the cause of delay; and

iv. The Contractor has provided a written request and other information to the County, as described in subsection (10.4) below, within ten (10) days after the time the Contractor knows or reasonably should have known of any cause which might result in a delay for which the Contractor may request an extension of time (the "Delay Notice"). The Contractor shall specifically state in such Delay Notice that an extension is or may be requested and identify the cause of the delay, describing the nature and its effect on the completion of the affected portions of the Work identified in the Delay Notice. If the Contractor fails to give the Delay Notice timely, the right to request an extension for such cause shall be

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waived.

10.2 All references in this Article to the Contractor shall be deemed to include Subcontractors and suppliers, all of whom shall be considered as agents of the Contractor.

10.3 The period of any extension of time shall be only that which is necessary to make up the time actually lost. The County reserves the right to rescind or shorten any extension previously granted if the County subsequently determines that any information provided by the Contractor in support of its request for an extension of time was erroneous or that there has been a material change in the facts stated.

10.4 The County may require the Contractor to furnish such additional information or documentation, as the County shall reasonably deem necessary or helpful in considering an extension request. The Contractor understands an extension of time will not be granted unless the Contractor affirmatively demonstrates to the County's reasonable satisfaction that the circumstances shown justify such extension.

10.5 Within thirty (30) days of its receipt of all information and documentation as may be required by the County, the County shall advise the Contractor of its decision on such requested extension. Notwithstanding the foregoing, where it is not reasonably practicable for the County to render its decision within such thirty (30) day period, it shall, prior to the expiration of such period, advise the Contractor that it will require additional time and the approximate date upon which it expects to render such decision.

10.6 Since the granting of an extension of time may materially alter the scheduling plans and other actions of the County and since, with sufficient notice, the County might, if it should so elect, attempt to mitigate the effect of the delay for which an extension of time might be claimed, and since mere oral notice may cause a dispute as to the existence or substance thereof, the giving of written notice as required in subsection (10.1)(iv) above shall be a condition precedent to the Contractor's rights hereunder.

10.7 Should any person seek a restraining order, preliminary injunction or an injunction, of which the Contractor becomes aware, which may delay the Work, configuration, installation, or delivery of the Solution, the Contractor shall promptly give the County a copy of all legal papers received or prepared or received by the Contractor in connection with such action or proceeding.

10.8 Neither permitting the Contractor to proceed with the Work subsequent to any missed schedule or performance of any Work (as such date may have been extended pursuant to Article 18 (Extension of Time Not Cumulative), nor the making of any payments to the Contractor shall compromise the County's contractual right to delay of payment as outlined within Appendix D (Payment Schedule) or to declare the Contractor in default.

10.9 County Extension of Time. The County may exercise upon reasonable notice to the Contractor, an extension of time to complete any County responsibility outlined within the Scope of Services. This notification shall include information as to the need for the extension and the anticipated date of completion. Contractor hereby agrees to make no claim for damages for the extension, whether contemplated or not contemplated, and agrees that any such claim shall be fully compensated for by an extension of time to complete performance of Services. Notwithstanding the foregoing, the parties agree to include as a component of the Project Plan, a reasonable timeframe for notification of extension(s) of time on a milestone by milestone basis. If the County fails to provide notification in accordance with the Project Plan, the Contractor may initiate a change request in accordance with Section 2.8 of Appendix A and the Contractor shall be allowed to modify Contractor's staff. If there is a conflict between this clause 10.9 and any other provisions of this Agreement, the terms, conditions, and obligations of this clause 10.9 shall govern and take precedence.

ARTICLE 11. EXTENSION OF TIME NOT CUMULATIVE

Subject to the provisions of 10.9, above, which shall control in the event of any conflict, in the event the Contractor shall be delayed concurrently by two or more of the causes identified in Article 10 (Extension of Time) above, the Contractor shall be entitled to a separate extension of time for each one of the causes.. In addition, the Contractor shall not be entitled, by reason of a delay, to an extension of time for the completion of the overall Services unless the overall services is necessarily affected by the delay. Accordingly, in the event of a delay, the Contractor shall proceed continuously and diligently with the performance of the unaffected portions of the Work.

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ARTICLE 12. NO DAMAGES FOR DELAY

Subject to the provisions of 10.9, above, which shall control in the event of any conflict, the Contractor hereby agrees to make no claim for damages for delay, whether contemplated or not contemplated, in the performance hereunder occasioned by any acts or omissions to act of the County, or any of its representatives or other contractors, and agrees that any such claim shall be fully compensated for by an extension of time to complete performance of the Work.

ARTICLE 13. PROTECTION OF SOFTWARE

13.1 No Reverse Engineering. The County agrees not to modify, reverse engineer, disassemble, or decompile the Licensed Software, or any portion thereof.

13.2 Ownership. County further acknowledges that all copies of the Licensed Software in any form provided by the Contractor are the sole property of the Contractor. The County shall not have any right, title, or interest to any License Software or copies thereof except as provided in this Agreement, and further shall secure and protect all Licensed Software and Documentation consistent with maintenance of Contractor's proprietary rights therein.

ARTICLE 14. SOFTWARE MODIFICATIONS

14.1 Solution Enhancements or Modifications. The County may, from time to time, request that the Contractor incorporate certain features, enhancements or modifications into the Solution. When requested by the County, the Contractor shall provide the requested Solution enhancements/modifications including all relevant source code. Upon the County's request for such enhancements/modifications, the Contractor shall prepare a Statement of Work ("SOW") for the specific Project that shall define in detail the Work to be performed. The Contractor shall submit a cost proposal including all costs pertaining to furnishing the County with the enhancements/modifications.

14.2 After the SOW has been accepted a detailed requirements and detailed design document shall be submitted illustrating the complete financial terms that govern the SOW, proposed Project staffing, anticipated Project schedule, and other information relevant to the Project. Each SOW executed hereunder shall automatically incorporate the terms and conditions of this Agreement. Such enhancements or modifications shall become the property of the County. Notwithstanding the foregoing, performance of any such modifications shall not compromise the Contractor's warranty obligations.

14.3 Following the County's acceptance of all enhancements/modification, the Contractor shall provide the County, if so requested with written confirmation of the date the enhancements/modification was applied to the Solution, and any and all Documentation relating to the Licensed Software and or enhancements/modification thereto.

ARTICLE 15. MAINTENANCE AND SUPPORT SERVICES

15.1 Subcontractor Service Level Agreement. Subcontractor shall provide maintenance and support services in the manner outlined in Appendix C (Subcontractor Service Level Agreement) for the cloud application throughout the term of this Agreement, including any options or extensions exercised by the County.

15.2 Capsule Updates. The Capsule will be updated as required to ensure compliance with Subcontractor seasonal releases. This is anticipated to entail up to three (3) Capsule releases per year, (usually Spring, Summer and Winter to align with the Subcontractor seasonal releases) but may vary according to the Subcontractor seasonal release schedule. New Capsule releases shall be made available to the County on a mutually agreed schedule. The following apply to Capsule updates:

1. The Contractor is responsible for applying the Capsule updates to the County's Subcontractor Org and performing any related activities (e.g., installation, configuration, training)
2. Contractor will provide defect resolution support, limited to defects within the Capsule itself, as below (See Capsule Defect Resolution)

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15.3 Capsule Defect Resolution. Contractor will provide defect resolution support for functionality of Capsules not working as designed. Defects resulting for any other issues (e.g., improper configuration of the Capsule, County custom development) are not covered under this Agreement.

- Defects will be classified (and responded to) according to the following severity levels:

Severity Level (Title)	Description	Response / Resolution Approach Service Level Agreement (SLA)
Level 1 (Significant)	Causes failure of the system resulting in the inability to perform essential, customer-focused tasks (service request intake, service request routing, and/or service request closure) and/or unrecoverable loss of critical data (e.g., service request details or critical customer information). No workarounds exist.	• Initial response with preliminary estimate and plan to resolve within 4 hours (Contractor business days 9AM-5PM EST) of Contractor's receipt of the defect. • Daily status updates to impacted Subscribers • Capsule Patch Release issued once an issue resolved.

Level 2 (Moderate)	Results in reduced functionality essential for successful operations. A work around exists but its sustained use is unsatisfactory.	• Initial response within 24 hours
		• Depending on specific nature of the issue, either:
		  ○ Capsule Patch Release issued as soon as issue resolved
		  ○ Issue resolved in next scheduled (e.g., Seasonal) Capsule release

Level 3 (Minor)	Results in reduced functionality for non-critical aspects of the system. A work around exists.	• Initial response within 48 hours • Issue resolved in next scheduled (e.g., Seasonal) Capsule release

The County shall be able to submit tickets electronically (via email) at anytime. Contractor will provide a support portal to submit tickets 24x7x365 as well as a phone number for submission of Severity Level 1 tickets between the hours of 9AM - 5PM (EST) on Contractor's business days.

ARTICLE 16. FUNCTIONALLY EQUIVALENT SOFTWARE Contractor warrants that during an applicable Subscription Term for the Licensed Software, Subcontractor shall not: (a) materially decrease the overall security of the Licensed Software, (b) the Licensed Software will perform materially in accordance with the Documentation and the terms of this Agreement, and (c) Subcontractor will not materially decrease the overall functionality of the Licensed Software. For purposes of this warranty, Licensed Software means the products and services that are ordered by Miami Dade County under the table in Appendix D, Section 2, Part 1 and made available online by Subcontractor. Further, Contractor warrants that during an applicable Subscription Term for the Licensed Software, Contractor will not materially decrease the overall functionality of the Licensed Software ordered under Appendix D, Section 2.

ARTICLE 17. PURCHASE OF ADDITIONAL PRODUCTS

Additional products related to the Solution for which the Contractor is the proprietary provider or authorized reseller/distributor may be purchased during the term of the Contract. In the event the County wishes to purchase such additional items, a County representative will contact the Contractor to obtain a price proposal for the additional items. For items for which the parties have established pricing in Appendix D (Payment Schedule), the pricing proposal shall not exceed the established pricing. In the event that the County opts to proceed with the purchase, an amendment will be mutually agreed upon by the parties and executed in writing.

ARTICLE 18. MARKINGS AND USAGE OF DATA

18.1 Markings. The County shall not remove, obscure or alter any Intellectual Property marking, confidentiality marking, or legal notice included with or otherwise relevant to any aspect of the Licensed Software. Subscriber shall not permit others to do so.

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18.2 License to Use Feedback. The County grants to Contractor an irrevocable, royalty-free, worldwide license of unlimited duration to use, modify, and incorporate into the Software any feedback, suggestions, requests, or recommendations relating to the Licensed Software.

18.3 Usage Data. The County grants to Contractor an irrevocable, royalty-free, worldwide license for the Subscription Term to use, modify, and incorporate into its own support offering, product development, operational plans, and sales or marketing materials, any anonymous usage data acquired from the County's use of the Licensed Software.

18.4 Use of Name. The County expressly agrees that Contractor may make references to the County and the County's URL and may use the County's name, trademark, and logo for the limited purpose of publishing it in the Contractor's current list of subscribers. Contractor may also respond to any inquiry regarding whether the County is a licensee and user of the Licensed Software.

ARTICLE 19. NOTICE REQUIREMENTS

All notices required or permitted under this Agreement shall be in writing and shall be deemed sufficiently served if delivered by: (i) Registered or Certified Mail, with return receipt requested; (ii) personally by a by courier service; (iii) Federal Express Corporation or other nationally recognized carrier to be delivered overnight; or (iv) via facsimile or e-mail (if provided below) with delivery of hard copy pursuant to (i), (ii), or (iii) in this paragraph. The addresses for such notice are as follows:

(1) To the County

a) to the Project Manager:

Miami-Dade County
Communications and Customer Experience Department
Attention: R. Adam Mullins
Phone: (305) 375-5982
E-mail: radam@miamidade.gov

b) to the Project Manager:

Miami-Dade County
Information Technology Department
Attention: Elizabeth Abelairas
Phone: (786) 442-7326
Email: elizabeth.abelairas@miamidade.gov

and

c) to the Contract Manager:

Miami-Dade County
Strategic Procurement Department
Attention: Chief Procurement Officer
111 NW 1st Street, Suite 1300
Miami, FL 33128-1974
Phone: (305) 375-4900
Email: cpo@miamidade.gov

(2) To the Contractor

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Incapsulate, LLC
650 Massachusetts Ave NW, Suite 600
Washington D.C 20002

Attention: Ramana Bhamidipati
Phone: (888) 589-2571
E-mail: finance@incapsulate.com

Attention: Mrudula Anne
Phone: (734) 546-3050
E-mail: mprabhakar@incapsulate.com

Either party may at any time designate a different address and/or contact person by giving notice as provided above to the other party. Such notices shall be deemed given upon receipt by the addressee.

ARTICLE 20. PAYMENT FOR SERVICES/AMOUNT OBLIGATED

The Contractor warrants that it has reviewed the County's requirements and has asked such questions and conducted such other inquiries as the Contractor deemed necessary in order to determine the price the Contractor will charge to provide the Work to be performed under this Contract. The compensation for all Work performed under this Contract, including all costs associated with such Work, shall be in accordance with Appendix D (Payment Schedule), and all amounts payable hereunder by the County shall be payable to the Contractor pursuant to the payment milestones as defined in Appendix D (Payment Schedule). Payments shall be based on payment milestones without regard to the hours worked on such milestones by the Contractor. The County shall have no obligation to pay the Contractor or any additional sum in excess of this amount, except for a change and/or modification to the Agreement, which is approved and executed in writing by the County and the Contractor. All Services undertaken by the Contractor prior to the County's approval of this Agreement shall be done at the Contractor's risk and expense.

With respect to travel costs and travel-related expenses, the Contractor agrees to adhere to Section 112.061 of the Florida Statutes as they pertain to out-of-pocket expenses, including employee lodging, transportation, per diem, and all miscellaneous cost and fees. The County shall not be liable for any such expenses that have not been approved in advance, in writing, by the County.

ARTICLE 21. PRICING

Prices shall remain firm and fixed for the term of the Contract, including any extension periods, pursuant to Appendix D (Payment Schedule); however, the Contractor may offer incentive discounts to the County at any time during the Contract term, including any extension thereof.

ARTICLE 22. METHOD AND TIMES OF PAYMENT

All invoices shall be taken from the books of account kept by the Contractor, shall be supported by copies of payroll distribution, receipt bills or other documents reasonably required by the County, shall show the County's contract number, and shall have a unique invoice number assigned by the Contractor. The County agrees to include Quote # 35919660 on the Notice to Proceed issued under this Agreement. It is the policy of Miami-Dade County that payment for all purchases by County agencies and the Public Health Trust shall be made in a timely manner and that interest payments be made on late payments. All firms, including Small Business Enterprises ("SBEs"), providing goods and services to the County, shall receive payment to maintain sufficient cash flow. In accordance with Section 218.74 of the Florida Statutes, and Section 2-8.1.4 of the Code of Miami-Dade County (the "Code"), the time at which payment shall be due from the County or the Public Health Trust (the "Trust") shall be forty-five (45) days from receipt of a proper invoice. Billings from prime contractors under services and goods contracts with the County or Trust, that are SBE contract set-aside, bid preference or contain a subcontractor goal, shall be promptly reviewed and payment made by the County or Trust on those amounts not under dispute within fourteen (14) calendar days of receipt of such billing by the County or the Trust pursuant to Sections 2-8.1.1.1.1 and 2-8.1.1.1.2 of the Code. All payments due from the County or the Trust, and not made within the time specified by this section shall bear interest from thirty (30) days after the due date at the rate of one percent (1%) per month on the unpaid balance. Further, proceedings to resolve disputes for payment of obligations shall be concluded by final written decision of the County Mayor, or

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his or her designee(s), not later than sixty (60) days after the date on which the proper invoice was received by the County or the Trust.

In accordance with Miami-Dade County Implementing Order No. 3-9, Accounts Receivable Adjustments, if money is owed by the Contractor to the County, the County reserves the right to retain such amount from payment due by County to the Contractor under this Contract. Such retained amount shall be applied to the amount owed by the Contractor to the County. The Contractor shall have no further claim to such retained amounts which shall be deemed full accord and satisfaction of the amount due by the County to the Contractor for the applicable payment due herein.

Invoices and associated back-up documentation shall be submitted electronically or in hard copy format by the Contractor to the County as follows:

Miami-Dade County
Information Technology Department c/o Miami-Dade County Finance Department
Shared Services Payable Unit
111 NW 1st 26th Floor
Miami, FL 33128
Email Invoice to: invsubp@miamidade.gov, with copy to itdaccountspayables@miamidade.gov

The County may at any time designate a different address and/or contact person by giving written notice to the other party.

ARTICLE 23. INDEMNIFICATION AND INSURANCE

The Contractor shall indemnify and hold harmless the County and its officers, employees, agents and instrumentalities from any and all third party claims, liability, losses or damages, including attorneys' fees and costs of defense, which the County or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractors. The Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the County, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. The Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by the Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County or its officers, employees, agents and instrumentalities as herein provided.

Upon County's notification, the Contractor shall furnish to the Internal Services Department, Strategic Procurement Division, Certificates of Insurance that indicate that insurance coverage has been obtained, which meets the requirements as outlined below:

A. Worker's Compensation Insurance for all employees of the Proposer as required by Chapter 440, Florida Statutes.

B. Commercial General Liability Insurance in an amount not less than $300,000 per occurrence. **Miami-Dade County must be shown as an additional insured with respect to** this coverage.

C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than $300,000 combined single limit per occurrence for bodily injury and property damage.

D. Professional Liability Insurance in an amount not less than $1,000,000.

E. Cyber Liability Insurance to include Privacy and Network Security in an amount not less than $1,000,000 per claim.

The insurance coverage required shall include those classifications, as listed in standard liability insurance manuals, which most nearly reflect the operations of the Contractor.

All insurance policies required above shall be issued by companies authorized to do business under the laws of the State of Florida, with the following qualifications:

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The company must be rated no less than **"A-"** as to management, and no less than **"Class VII"** as to financial strength, by Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey, or its equivalent, subject to the approval of the County Risk Management Division.

OR

The company must hold a valid Florida Certificate of Authority as shown in the latest "List of All Insurance Companies Authorized or Approved to Do Business in Florida", issued by the State of Florida Department of Financial Services and are a member of the Florida Guaranty Fund.

The mailing address of Miami-Dade County as the certificate holder must appear on the certificate of insurance as follows:

Miami-Dade County
111 NW 1st Street
Suite 2340
Miami, Florida 33128-1974

Compliance with the foregoing requirements shall not relieve the Contractor of this liability and obligation under this section or under any other section in this Agreement.

Award of this Contract is contingent upon the receipt of the insurance documents, as required, within ten (10) business days. If the certificate of insurance is received within the specified timeframe but not in the manner prescribed in this Agreement, the Contractor shall have an additional five business days to submit a corrected certificate to the County. If the Contractor fails to submit the required insurance documents in the manner prescribed in this Agreement within fifteen (15) business days, the Contractor shall be in default of the contractual terms and conditions and award of the Contract may be rescinded, unless such timeframe for submission has been extended by the County.

The Contractor shall assure that the certificate of insurance required in conjunction with this section remain in full force for the term of the Contract, including any renewal or extension periods that may be exercised by the County. If the certificate of insurance is scheduled to expire during the term of the Contract, the Contractor shall submit new or renewed certificate of insurance to the County before such expiration. If expired certificate of insurance is/are not replaced or renewed to cover the Contract period, the County may suspend the Contract until the new or renewed certificate is/are received by the County in the manner prescribed herein. If such suspension exceeds thirty (30) calendar days, the County may, at its sole discretion, terminate the Contract for cause and the Contractor shall be responsible for all direct and indirect costs associated with such termination.

ARTICLE 24. MANNER OF PERFORMANCE

24.1 The Contractor shall provide the Services described herein in a competent and professional manner satisfactory to the County in accordance with the terms and conditions of this Agreement. The County shall be entitled to a satisfactory performance of all Work described herein and to full and prompt cooperation by the Contractor in all aspects of the Work. At the request of the County, the Contractor shall promptly remove from the project any Contractor's employee, subcontractor, or any other person performing Work hereunder. The Contractor agrees that such removal of any of its employees does not require the termination or demotion of any employee by the Contractor.

24.2 The Contractor agrees to defend, hold harmless and indemnify the County and shall be liable and responsible for any and all claims, suits, actions, damages and costs (including attorney's fees and court costs) made against the County, occurring on account of, arising from or in connection with the removal and replacement of any Contractor's personnel performing services hereunder at the behest of the County. Removal and replacement of any Contractor's personnel as used in this Article shall not require the termination and or demotion of such Contractor's personnel.

24.3 The Contractor agrees that at all times it will employ, maintain and assign to the performance of the Work a sufficient number of competent and qualified professionals and other personnel to meet the requirements to which reference is hereinafter made. The Contractor agrees to adjust its personnel staffing levels or to replace any its personnel if so directed upon reasonable request from the County, should the County make a determination, in its sole discretion, that said personnel staffing is inappropriate or

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that any individual is not performing in a manner consistent with the requirements for such a position.

24.4 The Contractor warrants and represents that its personnel have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character and licenses as necessary to perform the Work described herein, in a competent and professional manner.

24.5 The Contractor shall at all times cooperate with the County and coordinate its respective work efforts to most effectively and efficiently maintain the progress in performing the Work.

24.6 The Contractor shall comply with all provisions of all federal, state and local laws, statutes, ordinances, and regulations that are applicable to the performance of this Agreement.

ARTICLE 25. EMPLOYEES OF THE CONTRACTOR

All employees of the Contractor shall be considered to be, at all times, employees of the Contractor under its sole direction and not employees or agents of the County. The Contractor shall supply competent employees. Miami-Dade County may require the Contractor to remove an employee it deems careless, incompetent, insubordinate or otherwise objectionable and whose continued employment on County property is not in the best interest of the County. Each employee shall have and wear proper identification.

ARTICLE 26. INDEPENDENT CONTRACTOR RELATIONSHIP

The Contractor is, and shall be, in the performance of all Work and activities under this Agreement, an independent contractor, and not an employee, agent or servant of the County. All persons engaged in any of the Work or Services performed pursuant to this Agreement shall at all times, and in all places, be subject to the Contractor's sole direction, supervision and control. The Contractor shall exercise control over the means and manner in which it and its employees perform the Work, and in all respects the Contractor's relationship and the relationship of its employees to the County shall be that of an independent contractor and not as employees and agents of the County.

The Contractor does not have the power or authority to bind the County in any promise, agreement, or representation other than specifically provided for in this Agreement.

ARTICLE 27. AUTHORITY OF THE PROJECT MANAGER / DISPUTE RESOLUTION

The Contractor hereby acknowledges that the County's Project Manager will determine in the first instance all questions of any nature whatsoever arising out of, under, or in connection with, or in any way related to or on account of, this Agreement including without limitations: questions as to the value, acceptability and fitness of the Services; questions as to either party's fulfillment of its obligations under the Contract; negligence, fraud or misrepresentation before or subsequent to acceptance of the Contractor's Proposal; questions as to the interpretation of the Scope of Services; and claims for damages, compensation and losses.

Further, the parties agree as follows:

a) The Contractor shall be bound by all determinations or orders and shall promptly comply with every order of the Project Manager, including the withdrawal or modification of any previous order and regardless of whether the Contractor agrees with the Project Manager's determination or order. Where orders are given orally, they will be issued in writing by the Project Manager as soon thereafter as is practicable.

b) The Contractor must, in the final instance, seek to resolve every difference concerning the Agreement with the Project

c) Manager. In the event that the Contractor and the Project Manager are unable to resolve their difference, the Contractor may initiate a dispute in accordance with the procedures set forth in this Article. Exhaustion of these procedures shall be a condition precedent to any lawsuit permitted hereunder.

d) In the event of such dispute, the parties to this Agreement authorize the County Mayor or designee, who may not be the Project Manager or anyone associated with this Project, acting personally, to decide all questions arising out of, under, or in

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connection with, or in any way related to or on account of the Agreement (including but not limited to claims in the nature of breach of contract, fraud or misrepresentation arising either before or subsequent to execution hereof) and the decision of each with respect to matters within the County Mayor's purview as set forth above shall be conclusive, final and binding on parties. Any such dispute shall be brought, if at all, before the County Mayor within ten (10) days of the occurrence, event or act out of which the disp ute arises.

e) The County Mayor may base this decision on such assistance as may be desirable, including advice of experts, but in any event shall base the decision on an independent and objective determination of whether Contractor's performance or any Deliverable meets the requirements of this Agreement and any specifications with respect thereto set forth herein. The effect of any decision shall not be impaired or waived by any negotiations or settlements or offers made in connection with the dispute, whether or not the County Mayor participated therein, or by any prior decision of others, which prior decision shall be deemed subject to review, or by any termination or cancellation of the Agreement. All such disputes shall be submitted in writing by the Contractor to the County Mayor for a decision, together with all evidence and other pertinent information in regard to such questions, in order that a fair and impartial decision may be made. Whenever the County Mayor is entitled to exercise discretion or judgement or to make a determination or form an opinion pursuant to the provisions of this Article, such action shall be fair and impartial when exercised or taken. The County Mayor, as appropriate, shall render a decision in writing and deliver a copy of the same to the Contractor. Except as such remedies may be limited or waived elsewhere in the Agreement, Contractor reserves the right to pursue any remedies available under law after exhausting the provisions of this Article.

ARTICLE 28. MUTUAL OBLIGATIONS

28.1 This Agreement, including attachments and appendices to the Agreement, shall constitute the entire Agreement between the parties with respect hereto and supersedes all previous communications and representations or agreements, whether written or oral, with respect to the subject matter hereto unless acknowledged in writing by the duly authorized representatives of both parties.

28.2 Nothing in this Agreement shall be construed for the benefit, intended or otherwise, of any third party that is not a parent or subsidiary of a party or otherwise related (by virtue of ownership control or statutory control) to a party.

28.3 In those situations where this Agreement imposes an indemnity obligation on the Contractor, the County may, at its expense, elect to participate in the defense if the County should so choose. Furthermore, the County may at its own expense defend or settle any such claims if the Contractor fails to diligently defend such claims, and thereafter seek indemnity for costs from the Contractor.

ARTICLE 29. QUALITY ASSURANCE/QUALITY ASSURANCE RECORD KEEPING

The Contractor shall maintain, and shall require that its Subcontractors and suppliers maintain, complete and accurate records to substantiate compliance with the requirements set forth in the Agreement. The Contractor and its Subcontractors and suppliers shall retain such records, and all other documents relevant to the Work furnished under this Agreement for a period of three years from the expiration date of this Agreement and any extension thereof.

ARTICLE 30. AUDITS

30.1 The County, or its duly authorized representatives and governmental agencies, shall until the expiration of three (3) years after the expiration of this Agreement and any extension thereof, have access to and the right to examine and reproduce any of the Contractor's books, documents, papers and records and of its Subcontractors which apply to all matters of the County. Such records shall subsequently conform to Generally Accepted Accounting Principles requirements, as applicable, and shall only address those transactions related to this Agreement.

30.2 Pursuant to Section 2-481 of the Code, the Contractor will grant access to the Commission Auditor to all financial and performance related records, property, and equipment purchased in whole or in part with government funds. The Contractor agrees to maintain an accounting system that provides accounting records that are supported with adequate documentation, and adequate procedures for determining the allowability and allocability of costs.

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30.3 Contractor may audit the business records and computer systems of the County to ascertain whether the County's use of the Licensed Software has been and is within the scope of the Subscription granted to the County, including but not limited to compliance with: (i) the limitation of usage to the designated the County; and (ii) the confidentiality, trade secret, and non-circumvention obligations set forth in this Agreement. Contractor shall provide Subscriber at least 30 days' notice prior to an audit. Contractor may use contracted professionals to assist in the audit or to conduct it on behalf of Contractor, such as accountants and computer technicians. Contractor shall be responsible to the County for ensuring that any such contracted professionals maintain the confidentiality of the County's Confidential Information. The County shall cooperate in any such audit by making relevant business records and computer systems available to Contractor and organized for review. The County shall not destroy evidence of the extent of its use of the Licensed Software between the time of receipt of notice of an audit and the completion of the conduct of the audit; doing so shall create a presumption that the County was willfully using the Licensed Software in excess of its license rights. Contractor may not audit more than once per calendar year unless a past audit by Contractor has demonstrated that the County was using the Licensed Software in violation the terms of this Agreement. If Contractor's audit reveals usage of the Licensed Software in violation of the terms of this Agreement, then the County shall pay to Contractor all of Contractor's out-of-pocket costs associated with the audit plus Contractor's then-current list-price for any unlicensed usage of the Licensed Software, i.e., the price that Contractor charges to a subscriber who does not presently have a Subscription to the Licensed Software and who is not entitled to any discounts. The County shall pay such sums within 30 days of written notice of the audit results from Contractor, and the County shall pay interest Article 22 (Method and Times of Payment).

ARTICLE 31. SUBSTITUTION OF PERSONNEL

In the event the Contractor wishes to substitute personnel for the key personnel identified by the Contractor's Proposal, the Contractor must notify the County in writing and request written approval for the substitution at least ten (10) business days prior to effecting such substitution. However, such substitution shall not become effective until the County has approved said substitution.

ARTICLE 32. CONSENT OF THE COUNTY REQUIRED FOR ASSIGNMENT

The Contractor shall not assign, transfer, convey or otherwise dispose of this Agreement, including its rights, title or interest in or to the same or any part thereof without the prior written consent of the County.

ARTICLE 33. SUBCONTRACTUAL RELATIONS

33.1 If the Contractor will cause any part of this Agreement to be performed by a Subcontractor, the provisions of this Contract will apply to such Subcontractor and its officers, agents and employees in all respects as if it and they were employees of the Contractor; and the Contractor will not be in any manner thereby discharged from its obligations and liabilities hereunder, but will be liable hereunder for all acts, omissions, and negligence of the Subcontractor, its officers, agents, and employees, as if they were employees of the Contractor. The Work performed by the Subcontractor will be subject to the provisions hereof as if performed directly by the Contractor.

33.2 The Contractor, before making any subcontract for any portion of the Work, will state in writing to the County the name of the proposed Subcontractor, the portion of the Work which the Subcontractor is to do, the place of business of such Subcontractor, and such other information as the County may require. The County will have the right to require the Contractor not to award any subcontract to a person, firm or corporation disapproved by the County.

33.3 Before entering into any subcontract hereunder, the Contractor will inform the Subcontractor fully and completely of all provisions and requirements of this Agreement relating either directly or indirectly to the Work to be performed. Such Work performed by such Subcontractor will strictly comply with the requirements of this Contract.

33.4 In order to qualify as a Subcontractor satisfactory to the County, in addition to the other requirements herein provided, the Subcontractor must be prepared to prove to the satisfaction of the County that it has the necessary facilities, skill and experience, and ample financial resources to perform the Work in a satisfactory manner. To be considered skilled and experienced, the Subcontractor must show to the satisfaction of the County that it has satisfactorily performed services of the same general type which is required to be performed under this Agreement.

33.5 The County shall have the right to withdraw its consent to a subcontract if it appears to the County that the subcontract will delay,

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prevent, or otherwise impair the performance of the Contractor's obligations under this Agreement. All Subcontractors are required to protect the confidentiality of the County's and County's proprietary and confidential information. Contractor shall furnish to the County copies of all subcontracts between Contractor and Subcontractors and suppliers related to the performance of the Work hereunder. Within each such subcontract, there shall be a clause for the benefit of the County in the event the County finds the Contractor in breach of this Contract, which permits the County to request completion by the Subcontractor of the Work pursuant to its performance obligations under the subcontract. The clause shall include an option for the County to pay the Subcontractor directly for the performance by such Subcontractor. Notwithstanding, the foregoing shall neither convey nor imply any obligation or liability on the part of the County to any subcontractor hereunder as more fully described herein.

ARTICLE 34. ASSUMPTION, PARAMETERS, PROJECTIONS, ESTIMATES AND EXPLANATIONS

The Contractor understands and agrees that any assumptions, parameters, projections, estimates and explanations presented by the County were provided to the Contractor for evaluation purposes only. However, since these assumptions, parameters, projections, estimates and explanations represent speculative predictions of future events: (a) the County makes no representations or guarantees; (b) the County shall not be responsible for the accuracy of the assumptions presented; (c) the County shall not be responsible for conclusions to be drawn therefrom; and (d) any assumptions, parameters, projections, estimates and explanations shall not form the basis of any claim by the Contractor. The Contractor accepts all risk associated with using this information.

ARTICLE 35. SEVERABILITY

If this Agreement contains any provision found to be unlawful, the same shall be deemed to be of no effect and shall be deemed stricken from this Agreement without affecting the binding force of this Agreement as it shall remain after omitting such provision.

ARTICLE 36. WARRANTIES AND COVENANTS, REMEDIES AND DISCLAIMER

36.1 Availability. Availability of the Licensed Software is subject to the availability of the Subcontractor environment in accordance with Appendix C (Subcontractor Service Level Agreement). The County expressly acknowledges and understands that there will be with exceptions to Availability for commercially reasonable downtime in line with other commercial software services for business functions, including such commercially reasonable downtime due to maintenance and, for repair, or updates whether scheduled or otherwise occasional technical difficulties.

36.2 County Data Security Warranty. Contractor shall maintain commercially reasonable administrative, physical, and technical safeguards for protection of the security, confidentiality, and integrity of County Data. Contractor shall not (i) modify County Data, (ii) disclose County Data except as compelled by law in accordance with a **"Compelled Disclosure"** (as set forth below) or as expressly permitted in writing by the County or by this Agreement, or (iii) access County Data except to provide the Licensed Software or prevent or address service or technical problems, or at the County's request. (The foregoing is the **"County Data Security Warranty."**) Nevertheless, despite the foregoing, should there occur a breach in the security of County Data (a **"County Data Security Breach"**), such as but not limited to disclosure by Contractor of County Data to an unauthorized third party or Contractor permitting an unauthorized third party to have access to County Data, then Contractor's sole notice obligation shall be to give notice to the County of that data security breach. It shall be the County's sole responsibility (and not Contractor's responsibility) to give notice of the County Data Security Breach to any other person or party as required by applicable law or as may be prudent for legal or business reasons. Contractor shall have no other responsibility or liability for a County Data Security Breach than otherwise set forth in this Agreement including, but not limited to, any security breach involving or resulting from the County's use of Subcontractor.

36.3 Warranty Disclaimer. Contractor provides only the covenants and warranties stated expressly in this Agreement. CONTRACTOR MAKES NO OTHER COVENANTS OR WARRANTIES AS TO THE LICENSED SOFTWARE, AND IT DISCLAIMS EACH OF THE FOLLOWING WARRANTIES THAT MIGHT OTHERWISE BE IMPLIED BY LAW: (i) IMPLIED WARRANTY OF MERCHANTABILITY; (ii) IMPLIED WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE, EVEN IF CONTRACTOR HAS BEEN ADVISED OF SUCH PURPOSE; (iii) IMPLIED WARRANTY OF NON-INFRINGEMENT, NON-MISAPPROPRIATION, AND NON-INTERFERENCE; (iv) IMPLIED WARRANTY OF ACCURACY; AND (v) IMPLIED WARRANTY OF SYSTEM INTEGRATION. The County agrees that no representations, warranties or covenants have been made regarding the Licensed Software other than those in this Agreement.

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ARTICLE 37. LIMITATION OF LIABILITY

37.1 FOR ALL CLAIMS ARISING FROM OR RELATED TO THIS AGREEMENT OR ITS SUBJECT MATTER, IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER FOR THE PAYMENT OF ANY CONSEQUENTIAL, INCIDENTAL, OR PUNITIVE DAMAGES, OR DAMAGES FOR LOST BUSINESS, LOST PROFITS, OR INTERRUPTED OPERATIONS, EVEN IF THE PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. EXCEPT FOR CLAIMS RELATED IP INFRINGEMENT, DATA BREACH, GROSS NEGLIGENCE OR WILLFUL MISCONDUCT, CONTRACTOR'S ENTIRE LIABILITY TO THE COUNTY FOR ALL CLAIMS ARISING FROM OR RELATED TO THIS AGREEMENT OR ITS SUBJECT MATTER, WHETHER IN CONTRACT, TORT OR OTHERWISE, SHALL NOT EXCEED THE AMOUNT OF FEES PAID IN THE LAST TWELVE MONTHS PRIOR TO THE CLAIM BY THE COUNTY TO CONTRACTOR UNDER THIS AGREEMENT. THE DISCLAIMER OF WARRANTIES AND LIMITATION OF LIABILITY ARE ESSENTIAL ELEMENTS OF THE BARGAIN BETWEEN THE PARTIES (WITHOUT WHICH THE TRANSACTIONS CONTEMPLATED BY THIS AGREEMENT WOULD NOT OCCUR) AND WILL APPLY EVEN IF A REMEDY, WARRANTY, OR COVENANT FAILS IN ITS ESSENTIAL PURPOSE.

37.2 If there is a conflict between this Article 37 (Limitation of Liability) and any other provisions of this Agreement, the terms, conditions, and obligations of this Article 37 (Limitation of Liability) shall govern and take precedence.

ARTICLE 38. TERMINATION AND SUSPENSION OF WORK

38.1 The County may terminate this Agreement if an individual or corporation or other entity attempts to meet its contractual obligation with the County through fraud, misrepresentation or material misstatement.

38.2 The County may, as a further sanction, terminate or cancel any other contract(s) that such individual or corporation or other entity has with the County and that such individual, corporation or other entity shall be responsible for all costs associated with such termination or cancellation, including attorney's fees.

38.3 The foregoing notwithstanding, any individual, corporation or other entity which attempts to meet its contractual obligations with the County through fraud, misrepresentation or material misstatement may be debarred from County contracting for up to five (5) years in accordance with the County debarment procedures. The Contractor may be subject to debarment for failure to perform and all other reasons set forth in Section 10-38 of the Code of Miami-Dade County.

38.4 In addition to cancellation or termination as otherwise provided in this Agreement, the County may at any time, in its sole discretion, with or without cause, terminate this Agreement by written notice to the Contractor.

38.5 In the event that the County exercises its right to terminate this Agreement, the Contractor shall, upon receipt of such notice, unless otherwise directed by the County:

i. stop work on the date specified in the notice (the "Effective Termination Date");

ii. take such action as may be necessary for the protection and preservation of the County's materials and property;

iii. cancel orders;

iv. assign to the County and deliver to any location designated by the County any non- cancelable orders for Deliverables, including Updates and Upgrades, that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement and not incorporated in the Services;

v. provide to the County, in a mutually agreed upon format, any and all County-owned data housed within or accessible by the Solution that is in the possession of the Contractor or any third party contracted by the Contractor; and,

vi. take no action which will increase the amounts payable by the County under this Agreement.

vii. if terminated for cause, reimburse the County a proration of the fees paid annually based on the remaining months of the term per the compensation listed in Appendix B (Payment Schedule).

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viii. In the event that the County exercises its right to terminate this Agreement, the Contractor will be compensated as stated in the payment Articles herein for the:

ix. portion of the Work completed in accordance with the Agreement up to the Effective Termination Date; and

x. non-cancelable Deliverables that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement, but not incorporated in the Services.

38.6 All compensation pursuant to this Article are subject to audit.

38.7 In the event the Contractor fails to cure an Event of Default, as defined below, timely, the County may terminate this Agreement, and the County or its designated representatives may immediately take possession of all applicable equipment, materials, products, documentation, reports and data.

38.8 The County may terminate this Agreement, upon not less than ten (10) days written notice from the County to the Contractor, if the Solution becomes obsolete or illegal to operate as configured and designed, due to a determination by a federal or state agency with jurisdiction that said Solution is not allowed.

38.9 Termination. Within five days of the effective date of termination, the County will certify in writing to Contractor that the County has ceased any and all use of the Software. Should Subscriber fail to so certify within those five days after termination, Subscriber agrees that it shall be liable for a Subscription fee in an amount of one month pro-rated to the annual fee.

38.10 Termination of this Agreement shall not bar either Party from pursuing any cause of action or remedy it may have available against the other Party for breach of the Agreement.

ARTICLE 39. EVENT OF DEFAULT

39.1 An Event of Default shall mean a breach of this Agreement by the Contractor. Without limiting the generality of the foregoing, and in addition to those instances referred to herein as a breach, an Event of Default shall include the following:

i. the Contractor has not delivered Deliverables, Solution, Work, Updates or Upgrades on a timely basis;

ii. the Contractor has refused or failed to supply enough properly skilled staff personnel;

iii. the Contractor has failed to make prompt payment to Subcontractors or suppliers for any Work;

iv. the Contractor has become insolvent (other than as interdicted by the bankruptcy laws), or has assigned the proceeds received for the benefit of the Contractor's creditors, or the Contractor has taken advantage of any insolvency statute or debtor/creditor law or if the Contractor's affairs have been put in the hands of a receiver;

v. the Contractor has failed to obtain the approval of the County where required by this Agreement;

vi. the Contractor has failed to provide "adequate assurances" as required under Article 39.2 below;

vii. the Contractor has failed in the representation of any warranties or certifications stated herein.

viii. data breach

ix. the Contractor fails to comply with Article 54 (User Access Program (UAP)).

39.2 When, in the opinion of the County, reasonable grounds for uncertainty exist with respect to the Contractor's ability to perform the Work or any portion thereof, the County may request that the Contractor, within the timeframe set forth in the County's request, provide adequate assurances to the County, in writing, of the Contractor's ability to perform in accordance with the terms of this Agreement. Until the County receives such assurances, the County may request an adjustment to the

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compensation received by the Contractor for portions of the Work which the Contractor has not performed. In the event that the Contractor fails to provide to the County the requested assurances within the prescribed timeframe, the County may:

i. treat such failure as a repudiation of this Agreement; and

ii. resort to any remedy for breach provided herein or at law, including but not limited to, taking over the performance of the Work or any part thereof either by itself or through others.

ARTICLE 40. NOTICE OF DEFAULT - OPPORTUNITY TO CURE

If an Event of Default occurs in the determination of the County, the County shall notify the Contractor (the "Default Notice"), specifying the basis for such default, and advising the Contractor that such default must be cured immediately or this Agreement with the County may be terminated. Notwithstanding, the County may, in its sole discretion, allow the Contractor to rectify the default to the County's reasonable satisfaction within a thirty (30) day period. The County may grant an additional period of such duration as the County shall deem appropriate without waiver of any of the County's rights hereunder, so long as the Contractor has commenced curing such default and is effectuating a cure with diligence and continuity during such thirty (30) day period or any other period which the County prescribes. The default notice shall specify the date the Contractor shall discontinue the Services upon the Termination Date.

ARTICLE 41. REMEDIES IN THE EVENT OF DEFAULT

If an Event of Default occurs, the Contractor shall be liable for all damages subject to the limitations in Article 37 resulting from the default, including but not limited to:

a) lost revenues;

b) the difference between the cost associated with procuring Services hereunder and the amount actually expended by the County for re-procurement of Services, including procurement and administrative costs; and

c) such other direct damages.

The Contractor shall also remain liable for any liabilities and claims related to the Contractor's default. The County may also bring any suit or proceeding for specific performance or for an injunction.

ARTICLE 42. PATENT AND COPYRIGHT INDEMNIFICATION

42.1 The Contractor shall not infringe on any copyrights, trademarks, service marks, trade secrets, patent rights, other intellectual property rights or any other third-party proprietary rights in the performance of the Work.

42.2 The Contractor warrants that all Deliverables furnished hereunder, including but not limited to: equipment, programs, documentation, software, analyses, applications, methods, ways, processes, and the like, do not infringe upon or violate any copyrights, trademarks, service marks, trade secrets, patent rights, other intellectual property rights or any other third party proprietary rights.

42.3 The Contractor shall be liable and responsible for any and all claims made against the County for infringement of patents, copyrights, service marks, trade secrets or any other third party proprietary rights, by the use or supplying of any programs, documentation, software, analyses, applications, methods, ways, processes, and the like, in the course of performance or completion of, or in any way connected with, the Work, or the County's continued use of the Deliverables furnished hereunder. Accordingly, the Contractor at its own expense, including the payment of attorney's fees, shall indemnify, and hold harmless the County and defend any action brought against the County with respect to any claim, demand, cause of action, debt, or liability.

42.4 In the event any Deliverable or anything provided to the County hereunder, or portion thereof is held to constitute an infringement and its use is or may be enjoined, the Contractor shall have the obligation to, at the County's option to (i) modify, or require that the applicable subcontractor or supplier modify, the alleged infringing item(s) at its own expense, without impairing in any respect the functionality or performance of the item(s), or (ii) procure for the County, at the Contractor's expense, the rights provided under this Agreement to use the item(s).

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42.5 The Contractor shall be solely responsible for determining and informing the County whether a prospective supplier or subcontractor is a party to any litigation involving patent or copyright infringement, service mark, trademark, violation, or proprietary rights claims or is subject to any injunction which may prohibit it from providing any Deliverable or Solution hereunder. The Contractor shall enter into agreements with all suppliers and Subcontractors at the Contractor's own risk. The County may reject any Deliverable or Solution that it believes to be the subject of any such litigation or injunction, or if, in the County's judgment, use thereof would delay the Work or be unlawful.

ARTICLE 43. CONFIDENTIALITY

43.1 All Developed Works (as defined in Article 45 (Proprietary Rights)) and other materials, data, transactions of all forms, financial information, documentation, inventions, designs and methods obtained from the County in connection with the Services performed under this Agreement, made or developed by the Contractor or its Subcontractors in the course of the performance of such Services, or the results of such Services, or which the County holds the proprietary rights, constitute Confidential Information and may not, without the prior written consent of the County, be used by the Contractor or its employees, agents, Subcontractors or suppliers for any purpose other than for the benefit of the County, unless required by law. In addition to the foregoing, all County employee information and County financial information shall be considered Confidential Information and shall be subject to all the requirements stated herein. Neither the Contractor nor its employees, agents, Subcontractors or suppliers may sell, transfer, publish, disclose, display, license or otherwise make available to others any part of such Confidential Information without the prior written consent of the County. Additionally, the Contractor expressly agrees to be bound by and to defend, indemnify and hold harmless the County, and their officer s and employees from the breach of any federal, state or local law in regard to the privacy of individuals.

43.2 The Contractor shall advise each of its employees, agents, subcontractors and suppliers who may be exposed to such Confidential Information of their obligation to keep such information confidential and shall promptly advise the County in writing if it learns of any unauthorized use or disclosure of the Confidential Information by any of its employees or agents, or subcontractor's or supplier's employees, present or former. In addition, the Contractor agrees to cooperate fully and provide any assistance necessary to ensure the confidentiality of the Confidential Information.

43.3 It is understood and agreed that in the event of a breach of this Article damages may not be an adequate remedy and the County shall be entitled to injunctive relief to restrain any such breach or threatened breach. Unless otherwise requested by the County, upon the completion of the Services performed hereunder, the Contractor shall immediately turn over to the County all such Confidential Information existing in tangible form, and no copies thereof shall be retained by the Contractor or its employees, agents, subcontractors or suppliers without the prior written consent of the County or as may be required by applicable law. A certificate evidencing compliance with this provision and signed by an officer of the Contractor shall accompany such materials.

43.4 Marking. The County Data are Confidential Information and do not need to be marked as such to have such status. For any other information to have Confidential Information status, Discloser must mark it conspicuously as "Confidential Information" or with other words that convey the same meaning, unless federal, state or local law makes that type of information confidential (e.g., "protected health information" under HIPAA).

43.5 Exclusions from Confidential Information. Confidential Information shall not include information that: (a) constitutes general skills and experience gained under this Agreement; (b) is already known by Recipient at the time of disclosure as established through written evidence pre-dating this agreement; (c) is publicly available at the time of disclosure or subsequently becomes publicly available through no fault of Recipient; (d) is required to be disclosed by governmental or judicial order; (e) is rightfully acquired by Recipient from a third party who is not in breach of an agreement to keep such information confidential; or (f) is developed by personnel of Recipient independently of, and without access or exposure to, the Confidential Information.

43.6 Compelled Disclosure. The Recipient may disclose Confidential Information of the Disclosure if it is compelled by law to do so, provided that the Recipient gives the Disclosure prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the Discloser's cost, if the Disclosure wishes to contest the disclosure. If the Recipient is compelled by law to disclose the Discloser's Confidential Information as part of a legal proceeding (except for litigation initiated by one Party against the other Party), the Disclosure shall reimburse the Recipient for its attorneys' fees and costs incurred and for Recipient's reasonable cost of compiling and providing secure access to such Confidential Information.

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43.7 Term of Confidentiality. The confidentiality obligations under this Agreement shall survive with respect to Confidential Information until such information is excluded from the definition of Confidential Information.

ARTICLE 44. PROPRIETARY INFORMATION

As a political subdivision of the State of Florida, Miami-Dade County is subject to the stipulations of the public records laws of the State of Florida (the "Public Records Law").

The Contractor acknowledges that all computer software in the County's possession may constitute or contain information or materials which the County has agreed to protect as proprietary information from disclosure or unauthorized use and may also constitute or contain information or materials which the County has developed at its own expense, the disclosure of which could harm the County's proprietary interest therein.

During the term of the contract, the Contractor will not use directly or indirectly for itself or for others, or publish or disclose to any third party, or remove from the County's property, any computer programs, data compilations, or other software which the County has developed, has used or is using, is holding for use, or which are otherwise in the possession of the County (the "Computer Software"). All third-party license agreements must also be honored by the Contractor and its employees, except as authorized by the County and, if the Computer Software has been leased or purchased by the County, all third-party license agreements must also be honored by the Contractors' employees with the approval of the lessor or Contractors thereof. This includes mainframe, minis, telecommunications, personal computers and any and all information technology software.

The Contractor will report to the County any information discovered or which is disclosed to the Contractor which may relate to the improper use, publication, disclosure or removal from the County's property of any information technology software and hardware and will take such steps as are within the Contractor's authority to prevent improper use, disclosure or removal.

ARTICLE 45. PROPRIETARY RIGHTS

45.1 The Contractor hereby acknowledges and agrees that the County retains all rights, title and interests in and to all materials, data, documentation and copies thereof furnished by the County to the Contractor, as a result of the Services the Contractor performs in connection with this Agreement, including all copyright and other proprietary rights therein, which the Contractor as well as its employees, agents, subcontractors and suppliers may use only in connection with the performance of Services under this Agreement. The Contractor shall not, without the prior written consent of the County, use such documentation on any other project in which the Contractor or its employees, agents, subcontractors or suppliers are or may become engaged. Submission or distribution by the Contractor to meet official regulatory requirements or for other purposes in connection with the performance of Services under this Agreement shall not be construed as publication in derogation of the County's copyrights or other proprietary rights.

45.2 All rights, title and interest in and to certain inventions, ideas, designs and methods, specifications and other documentation related thereto developed by the Contractor and its Subcontractors specifically for the County (collectively, the "Developed Works"), shall become the property of the County.

45.3 Accordingly, neither the Contractor nor its employees, agents, subcontractors or suppliers shall have any proprietary interest in such Developed Works. The Developed Works may not be utilized, reproduced or distributed by or on behalf of the Contractor, or any employee, agent, subcontractor or supplier thereof, without the prior written consent of the County, except as required for the Contractor's performance hereunder.

45.4 Except as otherwise provided in subsections 45.1, 45.2, and 45.3 above, or elsewhere herein, the Contractor and its subcontractors and suppliers hereunder shall retain all proprietary rights in and to all Licensed Software provided hereunder, that have not been customized to satisfy the performance criteria set forth in the Scope of Services. Notwithstanding the foregoing, the Contractor hereby grants, and shall require that its subcontractors and suppliers grant, if the County so desires, a perpetual, irrevocable and unrestricted right and license to use, duplicate, disclose and/or permit any other person(s) or entity(ies) to use all such Licensed Software and the associated specifications, technical data and other Documentation for the operations of the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may

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hereafter be formed by or become affiliated with the County. Such license specifically includes, but is not limited to, the right of the County to use and/or disclose, in whole or in part, the technical documentation and Licensed Software, including source code provided hereunder, to any person or entity outside the County for such person's or entity's use in furnishing any and/or all of the Deliverables provided hereunder exclusively for the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County. No such License Software, specifications, data, documentation or related information shall be deemed to have been given in confidence and any statement or legend to the contrary shall be void and of no effect.

ARTICLE 46. SUPPLIER/VENDOR REGISTRATION/CONFLICT OF INTEREST

46.1 Supplier/Vendor Registration

The Contractor shall be a registered vendor with the County – Strategic Procurement Department, for the duration of this Agreement. In becoming a registered vendor with Miami-Dade County, the vendor's Federal Employer Identification Number (FEIN) must be provided, via submission of Form W-9 and 147c Letter, as required by the Internal Revenue Service (IRS). If no FEIN exists, the Social Security Number of the owner must be provided as the legal entity identifier. This number becomes Contractor's "County Vendor Number." To comply with Section 119.071(5) of the Florida Statutes relating to the collection of an individual's Social Security Number, be aware that the County requests the Social Security Number for the following purposes:

- **Identification of individual account records**
- **Payments to individual/Contractor for goods and services provided to Miami-Dade County**
- **Tax reporting purposes**
- **Provision of unique identifier in the vendor database used for searching and sorting departmental records**

The Contractor confirms its knowledge of and commitment to comply with the following:

1. ***Miami-Dade County Ownership Disclosure Affidavit***
(Section 2-8.1 of the Code of Miami-Dade County)

2. ***Miami-Dade County Employment Disclosure Affidavit***
(Section 2.8.1(d)(2) of the Code of Miami-Dade County)

3. ***Miami-Dade County Employment Drug-free Workplace Certification***
(Section 2-8.1.2(b) of the Code of Miami-Dade County)

4. ***Miami-Dade County Disability and Nondiscrimination Affidavit***
(Section 2-8.1.5 of the Code of Miami-Dade County)

5. ***Miami-Dade County Debarment Disclosure Affidavit***
(Section 10.38 of the Code of Miami-Dade County)

6. ***Miami-Dade County Vendor Obligation to County Affidavit***
(Section 2-8.1 of the Code of Miami-Dade County)

7. ***Miami-Dade County Code of Business Ethics Affidavit***
(Article I, Section 2-8.1(i) of the Code of Miami-Dade County)

8. ***Miami-Dade County Family Leave Affidavit***
(Article V of Chapter 11 of the Code of Miami-Dade County)

9. ***Miami-Dade County Living Wage Affidavit***
(Section 2-8.9 of the Code of Miami-Dade County)

10. ***Miami-Dade County Domestic Leave and Reporting Affidavit***
(Article VIII, Sections 11A-60 - 11A-67 of the Code of Miami-Dade County)

11. ***Miami-Dade County Verification of Employment Eligibility (E-Verify) Affidavit.***
(Section 448.095, of the Florida State Statutes)

12. ***Miami-Dade County Pay Parity Affidavit***
(Resolution No. R-1072-17)

13. ***Miami-Dade County Suspected Workers' Compensation Fraud Affidavit***
(Resolution No. R-919-18)

14. ***Office of the Inspector General***
(Section 2-1076 of the Code of Miami-Dade County)

15. **Small Business Enterprises**
The County endeavors to obtain the participation of all small business enterprises pursuant to Sections 2-8.1.1.1.1, 2-8.1.1.1.2 and 2-8.2.2 of the Code of Miami-Dade County and Title 49 of the Code of Federal Regulations.

16. ***Antitrust Laws***
By acceptance of any contract, the Contractor agrees to comply with all antitrust laws of the United States and the State of Florida

46.2 Conflict of Interest and Code of Ethics

Section 2-11.1(d) of the Code requires that any County employee or any member of the employee's immediate family who has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County, competing or applying for a contract, must first request a conflict of interest opinion from the County's Ethics Commission prior to their or their immediate family member's entering into any contract or transacting any business through a firm, corporation, partnership or business entity in which the employee or any member of the employee's immediate family has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County. Any such

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contract or business engagement entered in violation of this subsection, as amended, shall be rendered voidable. All autonomous personnel, quasi-judicial personnel, advisory personnel, and employees wishing to do business with the County are hereby advised they must comply with the applicable provisions of Section 2-11.1 of the Code relating to Conflict of Interest and Code of Ethics. In accordance with Section 2-11.1(y) of the Code, the Miami-Dade County Commission on Ethics and Public Trust shall be empowered to review, interpret, render advisory opinions and letters of instruction, and enforce the Conflict of Interest and Code of Ethics Ordinance.

ARTICLE 47. INSPECTOR GENERAL REVIEWS

Independent Private Sector Inspector General Reviews

Pursuant to Miami-Dade County Administrative Order No. 3-20, the County has the right to retain the services of an Independent Private Sector Inspector General (the "IPSIG"), whenever the County deems it appropriate to do so. Upon written notice from the County, the Contractor shall make available to the IPSIG retained by the County, all requested records and documentation pertaining to this Agreement for inspection and reproduction. The County shall be responsible for the payment of these IPSIG services, and under no circumstance shall the Contractor's prices and any changes thereto approved by the County, be inclusive of any charges relating to these IPSIG services. The terms of this provision apply to the Contractor, its officers, agents, employees, Subcontractors, and assignees. Nothing contained in this provision shall impair any independent right of the County to conduct an audit or investigate the operations, activities, and performance of the Contractor in connection with this Agreement. The terms of this Article shall not impose any liability on the County by the Contractor or any third party.

Miami-Dade County Inspector General Review

According to Section 2-1076 of the Code, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts. The cost of the audit for this Contract shall be one quarter of one percent (0.25%) of the total Contract amount which cost shall be included in the total Contract amount. The audit cost will be deducted by the County from progress payments to the Contractor. The audit cost shall also be included in all change orders and all Contract renewals and extensions.

Exception: The above application of one quarter of one percent (0.25%) fee assessment shall not apply to the following contracts: (a) IPSIG contracts; (b) contracts for legal services; (c) contracts for financial advisory services; (d) auditing contracts; (e) facility rentals and lease agreements; (f) concessions and other rental agreements; (g) insurance contracts; (h) revenue-generating contracts; (i) contracts where an IPSIG is assigned at the time the contract is approved by the Board; (j) professional service agreements under $1,000; (k) management agreements; (l) small purchase orders as defined in Miami-Dade County Implementing Order No. 3-38; (m) federal, state

and local government-funded grants; and (n) interlocal agreements. ***Notwithstanding the foregoing, the Miami-Dade County Board of County Commissioners may authorize the inclusion of the fee assessment of one quarter of one percent (0.25%) in any exempted contract at the time of award.***

Nothing contained above shall in any way limit the powers of the Inspector General to perform audits on all County contracts including, but not limited to, those contracts specifically exempted above. The Miami-Dade County Inspector General is authorized and empowered to review past, present, and proposed County and Trust contracts, transactions, accounts, records, and programs. In addition, the Inspector General has the power to subpoena witnesses, administer oaths, require the production of records, and monitor existing projects and programs. Monitoring of an existing project or program may include a report concerning whether the project is on time, within budget and in conformance with plans, specifications, and applicable law. The Inspector General is empowered to analyze the necessity of and reasonableness of proposed change orders to the Contract. The Inspector General is empowered to retain the services of IPSIGs to audit, investigate, monitor, oversee, inspect, and review operations, activities, performance and procurement process, including but not limited to project design, specifications, proposal submittals, activities of the Contractor, its officers, agents and employees, lobbyists, County staff and elected officials to ensure compliance with contract specifications and to detect fraud and corruption.

Upon written notice to the Contractor from the Inspector General or IPSIG retained by the Inspector General, the Contractor shall make all requested records and documents available to the Inspector General or IPSIG for inspection and copying. The Inspector General and IPSIG shall have the right to inspect and copy all documents and records in the Contractor's possession, custody or control which, in the Inspector General's or IPSIG's sole judgment, pertain to performance of the Contract, including, but not limited to original

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estimate files, change order estimate files, worksheets, proposals and agreements form and which successful and unsuccessful Subcontractors and suppliers, all project-related correspondence, memoranda, instructions, financial documents, construction documents, proposal and contract documents, back-charge documents, all documents and records which involve cash, trade or volume discounts, insurance proceeds, rebates, or dividends received, payroll and personnel records, and supporting documentation for the aforesaid documents and records.

ARTICLE 48. FEDERAL, STATE, AND LOCAL COMPLIANCE REQUIREMENTS

As applicable, Contractor shall comply, subject to applicable professional standards, with the provisions of all applicable federal, state and the County orders, statutes, ordinances, rules and regulations which may pertain to the Services required under this Agreement, including, but not limited to:

a) Equal Employment Opportunity clause provided under 41 C.F.R. Part 60-1.3 in accordance with Executive Order 11246, "Equal Employment Opportunity", as amended.

b) Miami-Dade County Small Business Enterprises Development Participation Provisions.

c) The Clean Air Act (42 U.S.C. § 7401-7671q.) and the Federal Water Pollution Contract Act (33 U.S.C. §§ 1251-1387), as amended.

d) The Davis-Bacon Act (40 U.S.C. §§ 3141-3144 and 3146-3148) as supplemented by the Department of Labor regulations (29 C.F.R. Part 5).

e) The Copeland "Anti-Kickback" Act (40 U.S.C. § 3145) as supplemented by the Department of Labor regulations (29 C.F.R. Part 2).

f) Section 2-11.1 of the Code of Miami-Dade County, "Conflict of Interest and Code of Ethics".

g) Section 10-38 of the Code of Miami-Dade County, "Debarment of Contractors from County Work".

h) Section 11A-60 - 11A-67 of the Code of Miami-Dade County, "Domestic Leave".

i) Section 21-255 of the Code of Miami-Dade County, prohibiting the presentation, maintenance, or prosecution of false or fraudulent claims against Miami-Dade County.

j) The Equal Pay Act of 1963, as amended (29 U.S.C. § 206(d)).

k) The prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. §§ 6101-07) and regulations issued pursuant thereto (24 C.F.R. Part 146).

l) Section 448.07 of the Florida Statutes "Wage Rate Discrimination Based on Sex Prohibited".

m) Chapter 11A of the Code of Miami-Dade County (§ 11A-1 *et seq.*) "Discrimination".

n) Chapter 22 of the Code of Miami-Dade County (§ 22-1 *et seq.*) "Wage Theft".

o) Any other laws prohibiting wage rate discrimination based on sex.

p) Chapter 8A, Article XIX, of the Code of Miami-Dade County (§ 8A-400 *et seq.*) "Business Regulations".

q) Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

r) Executive Order 12549 "Debarment and Suspension", which stipulates that no contract(s) are "to be awarded at any tier or to any party which is debarred or suspended or is otherwise excluded from or ineligible for participation in Federal assistance

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programs".

Pursuant to Resolution No. R-1072-17, by entering into this Contract, the Contractor is certifying that the Contractor is in compliance with, and will continue to comply with, the provisions of items "j" through "o" above.

The Contractor shall hold all licenses and/or certifications, obtain and pay for all permits and/or inspections, and comply with all laws, ordinances, regulations and building code requirements applicable to the work required herein. Damages, penalties, and/or fines imposed on the County or Contractor for failure to obtain and maintain required licenses, certifications, permits and/or inspections shall be borne by the Contractor. The Project Manager shall verify the certification(s), license(s), and permit(s) for the Contractor prior to authorizing Work and as needed.

Notwithstanding any other provision of this Agreement, Contractor shall not be required pursuant to this Agreement to take any action or abstain from taking any action if such action or abstention would, in the good faith determination of the Contractor, constitute a violation of any law or regulation to which Contractor is subject, including but not limited to laws and regulations requiring that Contractor conduct its operations in a safe and sound manner.

ARTICLE 49. NONDISCRIMINATION

During the performance of this Contract, Contractor agrees to not discriminate against any employee or applicant for employment because of race, color, religion, ancestry, national origin, sex, pregnancy, age, disability, marital status, familial status, sexual orientation, gender identity or gender expression, status as victim of domestic violence, dating violence or stalking, or veteran status, and on housing related contracts the source of income, and will take affirmative action to ensure that employees and applicants are afforded equal employment opportunities without discrimination. Such action shall be taken with reference to, but not limited to recruitment, employment, termination, rates of pay or other forms of compensation, and selection for training or retraining, including apprenticeship and on the job training.

By entering into this Contract, the Contractor attests that it is not in violation of the Americans with Disabilities Act of 1990 (and related Acts) or Miami-Dade County Resolution No. R-385-95. If the Contractor or any owner, subsidiary or other firm affiliated with or related to the Contractor is found by the responsible enforcement agency or the County to be in violation of the Act or the Resolution, such violation shall render this Contract void. This Contract shall be void if the Contractor submits a false affidavit pursuant to this Resolution or the Contractor violates the Act or the Resolution during the term of this Contract, even if the Contractor was not in violation at the time it submitted its affidavit.

ARTICLE 50. CONFLICT OF INTEREST

The Contractor represents that:

a) No officer, director, employee, agent, or other consultant of the County or a member of the immediate family or household of the aforesaid has directly or indirectly received or been promised any form of benefit, payment or compensation, whether tangible or intangible, in connection with the award of this Agreement.

b) There are no undisclosed persons or entities interested with the Contractor in this Agreement. This Agreement is entered into by the Contractor without any connection with any other entity or person making a proposal for the same purpose, and without collusion, fraud or conflict of interest. No elected or appointed officer or official, director, employee, agent or other consultant of the County, or of the State of Florida (including elected and appointed members of the legislative and executive branches of government), or a member of the immediate family or household of any of the aforesaid:

   i) is interested on behalf of or through the Contractor directly or indirectly in any manner whatsoever in the execution or the performance of this Agreement, or in the Services, supplies or Work, to which this Agreement relates or in any portion of the revenues; or

   ii) is an employee, agent, advisor, or consultant to the Contractor or to the best of the Contractor's knowledge any subcontractor or supplier to the Contractor.

c) Neither the Contractor nor any officer, director, employee, agency, parent, subsidiary, or affiliate of the Contractor shall have an

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interest which is in conflict with the Con tractor's faithful performance of its obligation under this Agreement; provided that the County, in its sole discretion, may consent in writing to such a relationship, provided the Contractor provides the County with a written notice, in advance, which identifies all the individuals and entities involved and sets forth in detail the nature of the relationship and why it is in the County's best interest to consent to such relationship.

d) The provisions of this Article are supplemental to, not in lieu of, all applicable laws with respect to conflict of interest. In the event there is a difference between the standards applicable under this Agreement and those provided by statute, the stricter standard shall apply.

e) In the event Contractor has no prior knowledge of a conflict of interest as set forth above and acquires information which may indicate that there may be an actual or apparent violation of any of the above, Contractor shall promptly bring such information to the attention of the Project Manager. Contractor shall thereafter cooperate with the County's review and investigation of such information, and comply with the instructions Contractor receives from the Project Manager in regard to remedying the situation.

ARTICLE 51. PRESS RELEASE OR OTHER PUBLIC COMMUNICATION

Under no circumstances shall the Contractor without the express written consent of the County:

a) Issue or permit to be issued any press release, advertisement or literature of any kind which refers to the County, or the Work being performed hereunder, unless the Contractor first obtains the written approval of the County. Such approval may be withheld if for any reason the County believes that the publication of such information would be harmful to the public interest or is in any way undesirable; and

b) Communicate in any way with any contractor, department, board, agency, commission or other organization or any person whether governmental or private in connection with the Work to be performed hereunder except upon prior written approval and instruction of the County; and

c) Except as may be required by law, the Contractor and its employees, agents, Subcontractors, and suppliers will not represent, directly or indirectly, that any Work, Deliverables or Services provided by the Contractor or such parties has been approved or endorsed by the County.

ARTICLE 52. BANKRUPTCY

The County reserves the right to terminate this contract, if, during the term of any contract the Contractor has with the County, the Contractor becomes involved as a debtor in a bankruptcy proceeding, or becomes involved in a reorganization, dissolution, or liquidation proceeding, or if a trustee or receiver is appointed over all or a substantial portion of the property of the Contractor under federal bankruptcy law or any state insolvency law.

ARTICLE 53. GOVERNING LAW

This Contract, including appendices, and all matters relating to this Contract (whether in contract, statute, tort (such as negligence), or otherwise) shall be governed by, and construed in accordance with, the laws of the State of Florida. Venue shall be in Miami-Dade County.

ARTICLE 54. COUNTY USER ACCESS PROGRAM (UAP)

a) User Access Fee

Pursuant to Section 2-8.10 of the Code, this Contract is subject to a user access fee under the County User Access Program ("UAP") in the amount of two percent (2%). All sales resulting from this Contract, or any contract resulting from the solicitation referenced on the first page of this Contract, and the utilization of the County Contract price and the terms and conditions identified herein, are subject to the two percent (2%) UAP. This fee applies to all Contract usage whether by County Departments or by any other governmental, quasi-governmental or not-for-profit entity.

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The Contractor providing goods or services under this Contract shall invoice the Contract price and shall accept as payment thereof the Contract price less the 2% UAP as full and complete payment for the goods and/or services specified on the invoice. The County shall retain the 2% UAP for use by the County to help defray the cost of the procurement program. Contractor participation in this invoice reduction portion of the UAP is mandatory.

b) Joint Purchase

Only those entities that have been approved by the County for participation in the County's Joint Purchase and Entity Revenue Sharing Agreement are eligible to utilize or receive County Contract pricing and terms and conditions. The County will provide to approved entities a UAP Participant Validation Number. The Contractor must obtain the participation number from the entity prior to filling any order placed pursuant to this Section. Contractor participation in this joint purchase portion of the UAP, however, is voluntary. The Contractor shall notify the ordering entity, in writing, within three business days of receipt of an order, of a decision to decline the order.

For all ordering entities located outside the geographical boundaries of Miami-Dade County, the Contractor shall be entitled to ship goods on an "FOB Destination, Prepaid and Charged Back" basis. This allowance shall only be made when expressly authorized by a representative of the ordering entity prior to shipping the goods.

The County shall have no liability to the Contractor for the cost of any purchase made by an ordering entity under the UAP and shall not be deemed to be a party thereto. All orders shall be placed directly by the ordering entity with the Contractor and shall be paid by the ordering entity less the 2% UAP.

c) Contractor Compliance

If a Contractor fails to comply with this Article, that Contractor may be considered in default by the County in accordance with Article 24 of this Contract.

ARTICLE 55. INTEREST OF MEMBERS, OFFICERS OR EMPLOYEES AND FORMER MEMBERS, OFFICERS OR EMPLOYEES

No member, officer, or employee of the County, no member of the governing body of the locality in which the Project is situated, no member of the governing body in which the County was activated, and no other public official of such locality or localities who exercises any functions or responsibilities with respect to the project, shall, during his or her tenure, or for one year thereafter, have any interest, direct or indirect, in this Contract or the proceeds thereof.

ARTICLE 56. LIENS

The Contractor is prohibited from placing a lien on County property. This prohibition shall apply to all Subcontractors.

ARTICLE 57. FIRST SOURCE HIRING REFERRAL PROGRAM

Pursuant to Section 2-2113 of the Code, for all contracts for goods and services, the Contractor, prior to hiring to fill each vacancy arising under a County contract shall (1) first notify Career Source South Florida ("CSSF"), the designated Referral Agency, of the vacancy and list the vacancy with CSSF according to the Code, and (2) make good faith efforts as determined by the County to fill a minimum of fifty percent (50%) of its employment needs under the County contract through the CSSF. If no suitable candidates can be employed after a Referral Period of three to five days, the Contractor is free to fill its vacancies from other sources. Contractor will be required to provide

quarterly reports to the CSSF indicating the name and number of employees hired in the previous quarter, or why referred candidates were rejected. Sanctions for non-compliance shall include, but not be limited to: (i) suspension of Contract until Contractor performs obligations, if appropriate; (ii) default and/or termination; and (iii) payment of $1,500/employee, or the value of the wages that would have been earned given the noncompliance, whichever is less. Registration procedures and additional information regarding the First Source Hiring Referral Program are available at https://iapps.careersourcesfl.com/firstsource/.

ARTICLE 58. PUBLIC RECORDS AND CONTRACTS FOR SERVICES PERFORMED ON BEHALF OF MIAMI-DADE COUNTY

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The Contractor shall comply with the Public Records Laws, including by not limited to, (1) keeping and maintaining all public records that ordinarily and necessarily would be required by the County in order to perform the service; (2) providing the public with access to public records on the same terms and conditions that the County would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law; (3) ensuring that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (4) meeting all requirements for retaining public records and transferring, at no cost, to the County all public records in possession of the Contractor upon termination of the Contract and destroying any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements upon such transfer. In addition, all records stored electronically must be provided to the County in a format that is compatible with the information technology systems of the County. Failure to meet any of these provisions or to comply with Florida's Public Records Laws as applicable shall be a material breach of this Agreement and shall be enforced in accordance with the terms and conditions of the Agreement.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (305) 375-5773, ISD-VSS@MIAMIDADE.GOV, 111 NW 1st STREET, SUITE 1300, MIAMI, FLORIDA 33128.

ARTICLE 59. INDIVIDUALLY IDENTIFIABLE HEALTH INFORMATION and/or PROTECTED HEALTH INFORMATION

Any person or entity that performs or assists Miami-Dade County with a function or activity involving the use or disclosure of "Individually Identifiable Health Information (IIHI) and/or Protected Health Information (PHI)" shall comply with the Health Insurance Portability and Accountability Act (HIPAA) of 1996 and the Miami-Dade County Privacy Standards Administrative Order. HIPAA mandates for privacy, security, and electronic transfer standards, include but are not limited to:

1. Use of information only for performing Services required by the Contract or as required by law;
2. Use of appropriate safeguards to prevent non-permitted disclosures;
3. Reporting to Miami-Dade County of any non-permitted use or disclosure;
4. Assurances that any agents and Subcontractors agree to the same restrictions and conditions that apply to the Contractor and reasonable assurances that IIHI/PHI will be held confidential;
5. Making Protected Health Information (PHI) available to the customer;
6. Making PHI available to the customer for review and amendment; and incorporating any amendments requested by the customer;
7. Making PHI available to Miami-Dade County for an accounting of disclosures; and
8. Making internal practices, books and records related to PHI available to Miami-Dade County for compliance audits.

PHI shall maintain its protected status regardless of the form and method of transmission (paper records, and/or electronic transfer of data). The Contractor must give its customers written notice of its privacy information practices including specifically a description of the types of uses and disclosures that would be made with protected health information.

ARTICLE 60. VERIFICATION OF EMPLOYMENT ELIGIBILITY (E-VERIFY)

By entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095 of the Florida Statutes, titled "Verification of Employment Eligibility". This includes but is not limited to utilization of the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of all newly hired employees by the Contractor effective January 1, 2021 and requiring all Subcontractors to provide an affidavit attesting that the Subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. Failure to comply may lead to termination of this Contract, or if a Subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court no later than twenty (20) calendar days after the date of termination and the Contractor may be liable for any additional costs incurred by the County resulting from the termination of the Contract. If this Contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of one year after the date of termination. Public and private employers must enroll in the E-Verify System (http://www.uscis.gov/e-verify) and retain the I-9 Forms for inspection.

ARTICLE 61. EFFECTIVES OF COVID-19

The Contractor agrees that the presence of the coronavirus disease 2019 (COVID-19) or its direct or indirect effects, including but not

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Contractor, the Contractor may not be awarded a public contract for a period of one year after the date of termination. Public and private employers must enroll in the E-Verify System (http://www.uscis.gov/e-verify) and retain the I-9 Forms for inspection.

ARTICLE 61. EFFECTIVES OF COVID-19

The Contractor agrees that the presence of the coronavirus disease 2019 (COVID-19) or its direct or indirect effects, including but not limited to its effect on the Contractor's work force, the terms and conditions of the performance of the Work, the effects on the supply chain for the deliverables, or the overall effects on the economy, shall not constitute grounds for excuse, suspension or delay in the performance of the work or the delivery of the goods and services which are the object of this Contract. COVID-19 and its direct or indirect effects shall also not constitute a basis for any Contractor claims for additional costs or changes in the Work.

ARTICLE 62. FORCE MAJEURE

Contractor shall not be liable for any failure or delay caused by events beyond Contractor's reasonable control including, without limitation, the County's failure to perform its obligations in a timely fashion. Should Contractor be delayed from performing its obligations because of an event beyond its reasonable control, Contractor may and shall resume performance when the obstacle to performance is removed.

ARTICLE 63. SURVIVAL

The Parties acknowledge that any of the obligations in this Agreement will survive the term, termination, and cancellation hereof. Accordingly, the respective obligations of the Contractor and the County under this Agreement, which by nature would continue beyond the termination, cancellation, or expiration thereof, shall survive termination, cancellation or expiration hereof.

IN WITNESS WHEREOF, the Parties have executed this Agreement effective as of the last date that the Agreement is executed below,

Contractor		Miami-Dade County	
By:	Jonathan Light	By:	
Name:	JONATHAN LIGHT	Name:	Daniella Levine Cava
Title:	SENIOR VICE PRESIDENT	Title:	Mayor
Date:	APRIL 12, 2023	Date:	July 19, 2023
Attest:	Margaret L. Elder	Attest:	Olga Valverde e-18183
	Corporate Secretary/Notary Public		Clerk of the Board
			Olga Valverde Deputy Clerk

Digitally signed by Namita Uppal
DN: cn=Namita Uppal, o=Miami Dade County, ou=Chief Procurement Officer, email=uppaln@miamidade.gov, c=US
Date: 2023.07.17 16:54:22 -04'00'

MARGARET L ELDER
Notary Public
COMMONWEALTH OF MASSACHUSETTS
My Commission Expires On
November 30, 2023

Corporate Seal/Notary Seal

Approved as to form
and legal sufficiency

Sophi Gray
Assistant County Attorney

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APPENDIX A – SCOPE OF WORK

1.0 Background

Contractor will be configuring and implementing their proprietary commercial off the shelf (COTS) 311 Capsule Solution to meet the County's requirements for a next-gen, state-of-the-art Customer Relationship Management System (CRMS). The Solution will be based on Subcontractor Service Cloud Platform and the 311 Capsule package from Contractor that will then be configured to meet the County's 311 requirements.

2.0 Scope of Services

The Implementation Timeline shall be performed in thirty-two (32) weeks at a firm fixed price in accordance with Article 21 (Pricing) of the Agreement, beginning upon receipt of the Notice to Proceed, unless modified or amended per the terms of this Agreement. The overall purpose of this project is to provide and implement an enterprise wide, Solution for the County using the Subcontractor platform and the Contractor CRM Capsule.

2.1 Key Capabilities

The key capabilities of the Solution are listed in the Agreement as Exhibit A (Functionality Matrix), Exhibit B (Interface Business Use Case Development Matrix / Integration Matrix), and Exhibit C (Security Matrix).

2.2 Project Tasks/Deliverables

The following table describes the project activities and associated outcomes/Deliverables:

Activity	Description	Outcome / Deliverable
Project Kick-Off Prep	Contractor works with the County to refine the implementation schedule, identify key stakeholders and points of contact, to finalize key functional and technical objectives.	• Contractor to present the draft Project Plan • County to identify & assign key stakeholders for the project
Enable Purchased Subcontractor Licenses	Post Notice to Proceed execution, Subcontractor provisions an Org to the County and provides access to the pre-identified County Administrator. Contractor will work with the County team for initial user creation. Contractor will verify that all the necessary Subcontractor licenses have been provisioned and work with the County and Subcontractor teams as needed. Key Assumptions (if applicable) • All necessary Subcontractor licenses available at Project start • If required Contractor will walk the County administrator through how to create a user in Subcontractor.	• Subcontractor provisions & provides Solution Org access to the County. • County provides Org access to Contractor's team. • County starts on the Project Implementation Workbook
Install 311 Capsule – Console, Web & Mobile Apps	After Contractor provides the credentials for the provisioned cloud Solution environments, Contractor installs the 311 Capsule. *Key Assumptions (if applicable)* • County completes Project Implementation Workbook	• County: ○ Completes Project Implementation Workbook ○ Provide administrator access to County's Apple App Store and Android stores for mobile app registration and launch ○ Acquire Apple Enterprise Account to publish Mobile Worker iOS App • Solution ready for use and configuration • Web & Mobile apps branding setup based on the Project Implementation Workbook.

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Discovery & Alignment Sessions	The Project team (Contractor & County) then jointly identifies key SR types and KB Articles for initial focus of the Project for each department and works to align requirements with Solution functionality. This will result in a Requirements Traceability Matrix (RTM) that will be used to inform work going forward. Also, at this point, the Project plan will be finalized based on joint review with the County. *Key Assumptions* • Contractor shall play a consultative role and provide recommendations for SR type rationalizations based on information provided in the discovery sessions by the County. • County department Subject Matter Experts (SME) and stakeholders to facilitate change management and process improvement conversations needed. • County makes available key stakeholders and domain subject matter experts throughout the discovery & alignment process • Data migration strategy and planning will document records to be migrated and all assumptions	• Contractor to deliver Project Plan ○ Requirements Traceability Matrix ○ Data Migration Plan ○ SR Templates ○ Define Sandbox Strategy • County to review and provide Acceptance on the delivered Project documents. • Project team to align on ○ Strategic plan for SR Rationalizations and implementation per department. ○ Citizen & Worker Mobile App publication/launch strategy
Populate Service Request (SR) Templates	The County populates 311 Capsule Configuration SR templates based on existing SR types and the rationalization process. Templates capture intake questions and business rules (e.g., workflow, escalation.). These templates form the basis for SR configuration and behavior in the 311 Capsule. *Key Assumptions* • The County populates 311 Capsule Configuration SR templates • Contractor provides review, analysis, and recommendations based on previous implementations and discussed County requirements on the number of Service Request types that are needed by the County to meet operational needs • Up to 250 SR types will be configured by Contractor. Additional SR types may be configured by the County, or the County may, in its sole discretion, exercise the provisions of Article 17 (Purchase of Additional Products).	• County to populate the SR Configuration Templates • Contractor to provide o SR Configuration Progress Tracking o Knowledge article templates
Configure Service Requests and KBs	Based on templates as populated by the County, Contractor loads up to 250 SR types and 25 Knowledge Articles into the 311 Capsule. This is done in an Agile manner, with incremental batches of SR & Knowledge Articles being loaded and reviewed on an ongoing basis. Any lessons learned in configuring the initial SR will be incorporated into subsequent efforts. *Key Assumptions* • The County provides all Knowledge Content or identify TeamSite content for use by Users.	• Contractor to ○ Configure Up to 250 SR types in the Solution. ○ Review the Knowledge article templates ○ Configure up to 25 knowledge articles. • County to ○ Populate the knowledge article templates. ○ Review the configured SRs and Knowledge Articles in the Solution. • TeamSite OpenText content identified
Configure Integrations for GIS Services, County Systems, TeamSite OpenText, Web	The County makes ESRI GIS services available to Solution. Contractor subsequently integrates location and mapping services into 311 Capsule. Contractor integrates Customer self-service web portal into County website	• County team to ○ Make available (publicly accessible or authenticated) ESRI GIS services (ArcGIS version 10.x or higher) ○ Provide the composite layer

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Portal,Marketing Cloud and Social	Use app exchange product or API for TeamSite integration with Knowledge base to pull in existing content Contractor will integrate with the identified County systems using the MuleSoft Anypoint Platform. Contractor will provide implementation services to establish the Anypoint Platform: • Define and design the Anypoint Platform: Define the Anypoint platform architecture within the Customer environment. This includes the deployment model for the MuleSoft runtimes and Anypoint Management, physical architecture, environments model, common services frameworks, NFR's (Non-Functional Requirements) including security, SDLC (Systems Development Life Cycle) and CI/CD. • Define the Anypoint Platform milestones and Platform Minimum Viable Product (MVP) • Deploy the Anypoint Platform: Deploy (install or configure) the Anypoint Platform and MuleSoft runtimes. • Implement common services frameworks, NFR's including Security, CI/CD pipeline and DevOps approach • Measure Anypoint Platform: Measure and track Anypoint Platform milestones and KPIs (Key Performance Indicator) *Key Assumptions* • County makes available ESRI GIS services (ArcGIS version 10.x or higher) and provides the composite layer and locator end points. • County responsible for resolving related security and access issues • County push/pull reporting data using Subcontractor/Mulesoft and Contractor provided APIs • County has (or obtains) all necessary 3rd-party licenses as identified in the attached Exhibit A (Functionality Matrix), Exhibit B (Interface Matrix) and Exhibit C (Security Matrix) requirements matrices. • County provides access to Marketing Cloud and Social Studio Orgs	and locator endpoints. ○ Provide necessary mapping details & requirements for the integration • Contractor team to ○ Integrate ESRI GIS with CRM ○ Configure location-based validations using the mapping & requirements captured • Setup County Web Portal. • API Interface to up to 7 County systems as defined in the Exhibit B (Integration Requirements) use cases • Mulesoft Anypoint Platform installed
Configure Reports and Dashboards	Contractor will review out-of-the box Solution reports and dashboards with the County will review edits and options on Solution reports. The County will determine dashboard contents. *Key Assumptions* • Contractor will develop 3 reporting dashboards with up to 6 reports per dashboards	• County to define the reports and dashboards needed • Contractor to Setup Reports and Setup Dashboards in Solution.
Configure User Profiles and Roles	Contractor will configure User profiles and roles based on identification and classification of call center and department users by the County. *Key Assumptions* • County will provide Contractor with user roles and privileges information the County identifies Solution administrators.	• County to define the User roles, and permissions needed using the profiles & permissions matrix • Contractor to • Setup the county roles & profiles in the system • County Solution roles assigned to users
Systems Administrator Training	Contractor trains Solution administrators on Capsule and Solution admin topics. Contractor will provide up to 18 hours (typically 3-6 sessions of 2-3 hours each). Training may be in-person and/or remote (via video conference). Further details on training are provided below. *Key Assumptions*	• County to identify up to 10 Super Users and administrators • Contractor to provide up to 18 hours of recorded super user & 311 admin training

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	• Up to 18 hours of training sessions provided
	• Systems Super User and administrator training – Contractor will provide (typically 3-6 sessions of 2-3 hours each) for up to 10 of the County's designated Super Users and administrators an overview of Solution functionality, with a particular focus on the following:
	  ○ Service Request Configuration – Training and knowledge transfer regarding Service
	  ○ Configuration capabilities, including creation of new SR's and related questions, workflows, etc., modification of existing service requisitions, and deletion of SR's.
	  ○ Reporting – Training regarding creation of new CRM-related reports, modification of existing reports, etc. using Subcontractor reporting and dashboarding capabilities.
	  ○ User Administration – Training regarding adding/removing users, creation of profiles/roles, and association of users with profiles/roles.
	• Contractor will provide a recommended trail mix and details for the Subcontractor hosted admin training.
	• Prior to participating in this training, County resources will need to participate in Subcontractor-provided administrator training. Contractor will recommend specific Subcontractor courses, trailheads, etc. (see below for more details regarding Salesforce-provided training). County will be responsible in tracking the progress of their employees in completing the training in the timeframe identified in the Project Plan.	

User Acceptance Testing (UAT)	Contractor to provide generic test cases (if needed) to County as a starting point. County teams to create test cases & identify UAT users prior to UAT kick-off. County tests the system functionality thoroughly based on the requirements and the test cases.	• County accepts Solution is configured properly for County processes

End User Training	• County identifies Solution end-user trainers in the call center and departments
	• Contractor trains the County trainer who will then train all County call center and department end users
	• Frontline personnel and supervisors training – Contractor will provide end-user training to the County's 311 contact center personnel and supervisors. Contractor will provide them with the requisite training required prior to the launch of the new Solution for two types of end users:
	  ○ 311 Agent User Training – Agents will primarily use the Console app to manage customer engagement interactions, so Contractor will tailor a training course that details the processes of interaction management and capturing contacts and SR's through the 311 Capsule Agent Console.
	  ○ Department User Training – Departments interact with the Solution a little differently, so Contractor will create some additional content for them. Training of select department Users will cover the use of the Agent and department Consoles of the Capsule. The County Solution trainers trained by Contractor will be able to deliver the department User training classes for the majority of the Users.
		• County to identify the up to 60 Users responsible for delivering end User training.
		• Contractor to provide Up to 12hrs hours of train the trainer sessions.
		• Trained County call center and department staff end users are trained and ready to use the Solution

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Staging and Production Deployment (Go Live)	• Contractor will ○ Prep the production environment ○ Based on the Sandbox Strategy defined at the start of the Project, the non-production sandbox environments will be ready to support the Go-Live environment, and allow future testing, training and updates. ○ Submit mobile apps for app store approval 3 weeks prior to Go-Live County will implement the Go-Live and Deployment Plan according to schedule. Contractor will support Go-Live onsite with County team.	• Solution production environment is ready • Go Live date scheduled • Support plan enabled

2.3 Technical Responsibility Matrix

The following table defines the roles and responsibilities for the County and Contractor.

Task	Incapsulate Responsibility	County Responsibility
Service Request Configuration	• Configure up to 250 SR types • Incorporate feedback • Deploy system to production	• Provide business staff to help complete Contractor provided templates and workbooks • Provide Users to conduct UAT • Provide acceptance
Knowledge Base Configuration	• Configure up to 25 Knowledge Articles • Incorporate feedback • Deploy system to production	• Provide business staff to help author knowledge base content articles • Provide Users to conduct UAT • Provide acceptance
Public-Facing Web Portal and Mobile App	• Submit mobile app to App Store and Android Stores 3 weeks prior to Go-Live	• Provide admin access to County's Apple App Store and Android stores for mobile app registration and launch • Acquire Apple Enterprise Account to publish Mobile Worker iOS App
Configure 311 Standard Report and Dashboards	• Configure dashboards and reports as proposed • Incorporate feedback • Deploy system to production	• Provide staff to conduct UAT • Provide acceptance
Integration Strategy (ESRI and up to 7 MCD systems)	• Configure Capsule ESRI Connector • Configure APIs for 7 County systems for Waste Collection, Public Works, Mosquito Control, Regulatory and Economic Resource, Transit Bus Management, Chameleon and Elections as defined in the in Exhibit B – (Interface Business Use Case Development Matrix / Interface Matrix).	• Provide access to GIS Team and all GIS services should be either be publicly accessible or authenticated • There must be one Composite Locator Service containing the necessary locators • There must be one Composite Layer Service containing the necessary layers • Provide requirements and mapping necessary for the GIS integration • County will identify SMEs on each County system to complete API integrations with each target system
Data Migration (DM)	• Identify format of data migration templates for legacy SRs • Provide data migration strategy and approach • Finalize the DM plan based on the data & sources identified to be migrated	• Setup mySQL or Oracle or SQL server database needed to host the legacy, staging and backup tables and provide full access to Contractor team. • User Migration and creation in SF environment

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	• Provide the staging table schema setup needed • Create a Subcontractor User ID for DM purpose with full access if necessary • Provide Solution data model with the fields & objects to enable mapping • Provide the data cleanup guidelines based on Solution requirements and functional recommendations. • Review cleaned data up to 2 rounds • Develop DM scripts • Load data to DM sandbox for review and feedback. Up to 2 rounds of feedback and mapping updates. • Load clean legacy data provided by County	• Define criteria for individual table & data records that have to be imported. • Setup Windows server for DM scripts to run and backup data files • Provide VPN access to Contractor team to access the DB and Windows server • Provide data mapping between input and Subcontractor system necessary for the DM activity • Prepare clean set of legacy data for data migration after data integrity feedback from Contractor • Populate the input tables with the clean data • Provide approval if bulk cleaning is more appropriate • Review data loaded in the Subcontractor sandbox and provide approval.
Training	Admin/Super-user Training • Up to 18 hours of admin/Super-User training • Admin training for up to 10 users on Capsule configuration & administration. Train-The-Trainer. • Train-the-Trainer up to 60 users with a maximum of 12 hours divided into 3 sessions (up to 4hrs each) with a maximum of 20 users in each session.	• Identify County staff for admin/Super User training • Attendees to complete prerequisite Subcontractor admin training recommended by Contractor • Access to County trainers • Training facility with computers and access to the Internet
Documentation	Contractor will provide the following documentation in an electronic format: • SR Configuration Guide • Enhanced Open 311 API • Capsule Data Dictionary	The County will provide the following: • Access to SMEs • Security/Active Directory Documentation • 311 CRM User list • GIS Documentation • Completed SR Templates/Workbooks

2.4 Implementation Plan

Contractor Project methodology consists of the following steps:

- **Kickoff and Install –** Contractor will install the Solution early in the project to maximize team effectiveness, providing the Solution early in the Project. While this makes the licenses available for use by the Project team, the County will pay for the licenses in accordance to the Appendix D (Payment Schedule), Milestone 1b.
- **Discover and Align –** Contractor will work with the County to confirm Project requirements and map to the capabilities of Capsule's built-in functionality. A key part of this process will be to work with the County to determine the approach Contractor would recommend for which County departments the Solution would support initially, as well as how the County and Contractor would work together to add other County departments in future phases of the Project. Strategy for the Project for security and data migration is determined as well.
- **Configure and Integrate –** Contractor will immediately begin documenting Service Request types for configuration and identifying required Knowledge Articles and configure these in the Solution for review and trial with the initial department and key Users. Contractor will work with the County to adapt the requirements to the existing out-of-the-box capabilities of the Capsule and Subcontractor to help the Project stay inside the agreed Scope of Work. The exception would be requirements in the matrices pre-identified as needing custom development. Based on the discovery & alignment sessions if there are requirements that cannot be addressed through configuration, Contractor will work with the County to discuss alternative approaches.

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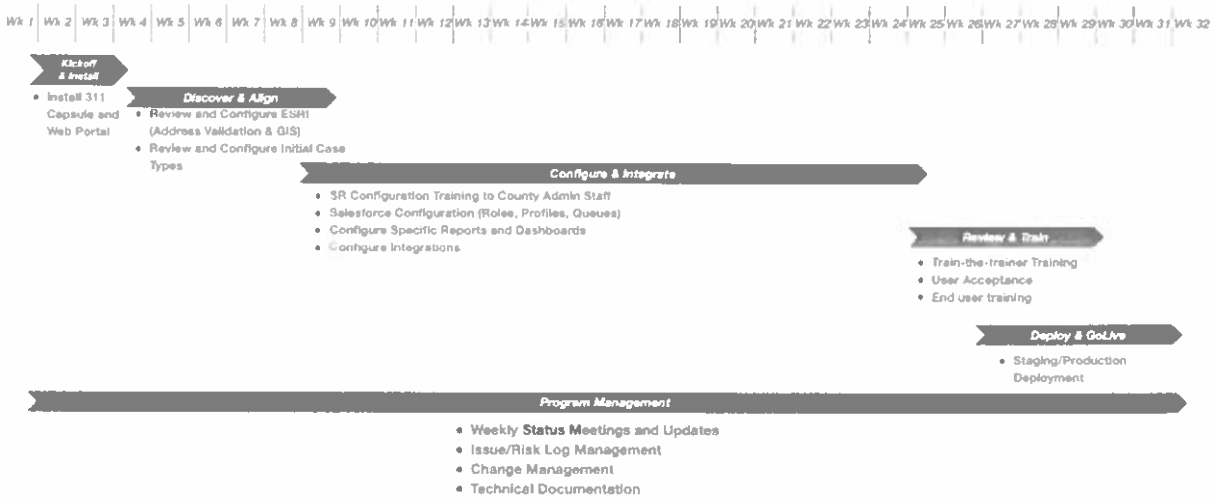
- **Review and Train –** This "out-of-the-box" configuration approach speeds time-to-results so that the County begins using the Solution early in the Project, confirming that processes are correctly implemented and are working as designed
- **Deploy and Go-Live –** As installation, we promote and migrate completed configurations and system administration requirements from testing to production environments, train Users and prepare for a successful Go-live

Implementation Timeline – Contractor shall provide a thirty two-week Implementation Timeline based upon the Project plan for the Solution to implement the Capsule Solution that will support County objectives as shown in the figure below.



Contractor's proposed Implementation Plan and Project Plan.

This schedule of tasks/activities will be finalized in consultation with the County upon Notice to Proceed.

Phase	Task/Activity	Responsible
KICKOFF & INSTALL	*Install Capsule*	*Contractor*
DISCOVER *& ALIGN*	*Discovery & Alignment Sessions*	*Contractor / County*
	Populate SR Templates	*Contractor / County*
CONFIGURE & INTEGRATE	*Configure SRs & KB Articles*	*Contractor*
CONFIGURE & INTEGRATE	*Integrations: GIS, Web Portal, County systems for Waste, Public Works, Mosquito Control, Regulatory and Economic Resource, Transit Bus Management, Chameleon and Elections*	*Contractor / County*
CONFIGURE & INTEGRATE	*Configure Reports and Dashboard*	*Contractor / County*
CONFIGURE & INTEGRATE	*Configure User Profiles & Roles*	*Contractor / County*
REVIEW & TRAIN	*User Acceptance*	*Contractor / County*
	System Admin Training	*Contractor / County*
	End-User Training	*Contractor / County*

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DEPLOY & GO-LIVE	*Deployment & Go-Live*	*Contractor*

2.5 County Resource Plan and Project Deliverables

Role	Activities Performed	Availability
Executive Sponsor	• Decision maker for Project issues	As needed to support the Project
Project Manager	• Project management • Status reporting • Coordination with department • Coordinate API Integrations with existing systems	**Recommendation: 50%** of the time for the project duration
Business Owners	• Involved in day-to-day project activities • Populate SR and Knowledge Article templates • Responsible for requirement sign-off	**Recommendation**: 50% of the time for the project duration
Department SMEs Sponsor	• Provide expertise on department processes or technologies	**Recommendation: 25%** through discovery and alignment phase and as needed for the remainder of the Project
County System Administrators	• Configure service requests once trained on templates	**Recommendation:** Approximately **50%** during the service request configuration phase
Department IT Staff	• Resolve security issues and validate compliance with County IT standards	As needed, throughout the Project

2.6 Project Meetings

Contractor understands that the strategic planning and delivery of communications are integral to the success of this Project. Importantly, Contractor cannot communicate to all stakeholders with a "one size fits all" approach. Understanding how communications cascade to County stakeholders is critical in making sure that stakeholder groups are informed and equipped with the necessary information they need at the right time. Identifying and confirming that 'influencer' groups are informed and knowledgeable will help Contractor effectively drive messaging and awareness to stakeholder groups through governance structure.

Contractor expectation is that day-to-day leads for both Contractor and the County will be assigned to the Project (i.e., Project Manager, Business Owners for departments). These Business Owners must have deep knowledge of the intended solution, so that they can make informed trade-off decisions during the project. The Business Owners should have the appropriate experience, availability, and decision-making authority to represent their departments on a day-to-day basis. The Business Owner can support the review of the requirements and Solution options, helping the team to prioritize their Work according to the needs of the County and the individual departments. These Business Owners are also integral to communications and change management. Contractor will work with the County's Business Owners to identify stakeholders impacted by the deployment of the new Solution and develop a targeted communication plan that will increase awareness and engagement across stakeholder groups.

To be effective, communications need to be clear, consistent and come from a trusted source. Contractor will work with the County's Business Owners to identify the most effective existing internal channels of communications and to establish new communication channels as appropriate, both as part of the formal governance structure and the County's established informal ways of working.

This implementation will be coordinated through regular activities and reports, outlined in the table below. Meeting count assumes a thirty two-week delivery window, extensions to timeline or requests for additional meetings upon formal request from the County will be handled through the change request process described in Section 2.8 (Change Request Process).

Activity	Cadence	Approx Count	Assumptions
Project Status Report	Weekly	32	Assuming a thirty-two-week delivery

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Team Check-Ins	Ad Hoc	32	Meeting cadence will vary depending on project needs, scheduled at needed
SME Touchpoint	Ad Hoc	15	Hour-long sessions with technical experts to support client activity and strategy, scheduled at needed
Executive Work Group	Bi-Weekly	16	Hour-long sessions with executive stakeholders from the County and the Contractor to present project status and for strategic oversight and guidance.

2.7 Governance Deliverables

Contractor considers status reporting to be an essential prerequisite to effective management of a project. Contractor's reporting systems emphasize providing early feedback, which requires that every activity item owner will report promptly whether issues or potential issues may impact the schedule so that the necessary mitigation steps can be taken. Contractor's Project Manager will produce weekly Project Status Reports to serve as a platform to facilitate a continuous program dialogue and enable Contractor to effectively meet the County's expectations. This dialogue helps to confirm that the information is continually flowing between appropriate parties and that efforts remain concentrated on the tasks.

Weekly Status Process – Weekly Project status reporting will provide the County with updated Project status, risks & issues, and upcoming activities as shown in the image below. This specific status reporting process serves two purposes:

- Project Manager will only seek information from workstream leads once per week, effectively minimizing the requests for status and controlling it to prevent spin on the Project issues.
- Reporting is rolled up from this status process for various stakeholders to maintain the integrity and validity of Project information. The master Project schedule will be the source of information related to scope and schedule.

In addition to weekly status reports, below are the standard Deliverables that will be made available to Project stakeholders through meetings and enshrined in a shared Microsoft Teams folder and through SharePoint.

Name	Cadence	Medium / Location
Project Schedule	Bi-Weekly	Shared Google Drive
Project Status Report	Weekly	Email, Shared Google Drive
Risk Register	Weekly	Shared Google Drive
Issue Log	Weekly	Shared Google Drive

2.8 Change Request Process

When either party identifies the need for a change in the Scope of Work, a change review process will be initiated by the requesting party in order to determine the appropriate authority to review and approve the change. Changes may include, but are not limited to, the following:

1) Any change that impacts Appendix D (Payment Schedule)
2) Any changes that impacts the Implementation Timeline
3) Any changes that impact staffing levels for either party
4) Additions or deletions to functionality outlined in accordance with this SOW.
5) Any changes to any Deliverable or required Service listed in this Appendix A (Scope of Work)

Upon identification, the change request will be submitted to the County's Project Manager for review and determination of the appropriate authority. The County may request feedback or additional information from a Contractor Project Manager regarding any change requested. Following review, the County Project Manager will notify the Contractor Project Manager of the appropriate authority level in accordance with the governance structure outlined in Section 2.7 (Governance Deliverables). In the event that a

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change request has material contractual impacts, appropriate approval may be sought from the County Mayor or Designee, or the Board of County Commissioners. Minor changes that do not impact cost, overall project schedule, or overall functionality may be approved by the County's Project Manager do not constitute a change request and shall be captured in the associated status report and/or Project Plan.

For avoidance of doubt, Services not explicitly stated in this Scope of Work, but reasonably required to be performed by Contractor in order to successfully implement the Solution and gain County acceptance shall not be subject to additional compensation by the County. This includes the delivery and acceptance of all functional and technical requirements identified in Exhibit A (Functionality Matrix) and delivery and acceptance of all interfaces delineated in Exhibit B (Interface Matrix) hereto, even in the event that the information gathered in the alignment sessions outlined in Section 2.2 (Project Tasks/Deliverables) reveals that additional effort, resources, staffing, or work arounds are required by Contractor in order to achieve Acceptance. Reasonably required services for the purposes of this paragraph will not be construed to include service delivery requirements, product requirements or interfaces not explicitly discussed in this Appendix A (Scope of Work) or listed in Exhibit A (Functionality Matrix) or Exhibit B (Interface Matrix). Both the contractor and Miami Dade County will make a good faith effort to maximize use of the out-of-the box capabilities of the Salesforce and Incapsulate software included in the Solution.

2.9 Acceptance Criteria

The below are criteria for Project Acceptance. General Conditions

- Only designated employees of the County team (or their authorized delegates) will provide Acceptance of Deliverables using Attachment D1 (Acceptance Form). Attachment D1 (Acceptance Form) may be provided electronically.
- The Project will be delivered in agile sprints. The functionality delivered as part of those sprints will need to be tested at the end of the relevant sprints as defined in the Project plan. Sprint based testing needs to be completed within one business week post sprint delivery. Any feedback or issues identified will be discussed with the County and categorized as bugs or changes. Bugs will be marked as open items and addressed right away or in subsequent sprints. UAT and Acceptance for different aspects of the Project implementation will be handled individually at the appropriate project phase. Sprint Acceptance, excluding any identified open items to be provided within three (3) business days of testing period completion.
- The County will conduct system wide UAT and provide Acceptance for the entire Solution within five (5) business days of the UAT period completion. This will be part of the Go-Live sign-off and prep for production deployment will be initiated. The UAT time period will start over if the County identifies material issues that prevent end-to-end business processes to be completed. The User Acceptance period will be specified in the Project plan.

User Acceptance Testing (UAT): User Acceptance Testing (UAT) is the opportunity for the County to validate the Solution. The key objective of UAT is to gain Final Acceptance from the County and agency user community for the Solution once they verify that the Solution meets defined requirements and design specifications. The release is delivered as a baseline, grouping system functionality into a consolidated package for subsequent testing cycles and phases.

Activities and Outputs

Key Activity	Description	Output	Responsibility
UAT Testers/Users	County will identify the Users who would be responsible for completing the UAT and assign roles for each UAT User so they are prepared and are aware of the functionality and timelines to test the Solution.	UAT Users and Roles identified, availability confirmed for UAT.	County
User Acceptance Test Plan	Contractor will create a UAT Test Plan that defines how UAT is performed by outlining the objectives, responsibilities, and testing timeline. This document also includes details of the sample user-Acceptance Test scenarios. UAT is a user-driven process of testing, so that the County is ready to cutover to the new Solution. UAT focuses on site user readiness and validation of cutover correctness.	User Acceptance Testing Plan	Contractor

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UAT Test Scripts and Test Cases	Contractor will support the County in developing the test scripts and test cases to test the functional, system, integration, and data requirements. This document also includes details of the identified UAT scenarios.	UAT Test scripts, cases, and applicable acceptance criteria	County
User Acceptance Testing	The County will conduct user acceptance testing for each of the business processes to verify the solution meets the requirements of the pilot. Defects are tracked, triaged, and repaired during two (2) user acceptance test cycles. Each UAT cycle will have its own scope of functionality that will be tested during that cycle. Contractor will prepare a UAT results report containing the complete results of the user-driven process of testing of the business functions and processes at a high level.	UAT Results Report	County conducts UAT Contractor prepares report
Deployment Plan	Contractor will define the tasks, timing, dependencies, and resources required to perform the system cutover from the legacy system to the new Solution. The Deployment Plan is used to both plan the deployment and manage the execution of the deployment tasks to promote a smooth transition to the users of the new Solution.	Deployment Plan	Contractor
Conduct Go/No-Go Evaluation	Contractor and County will conduct a joint Go/No-Go meeting with the key stakeholders of the Project and assess the readiness for going live and decide as to whether or not the Solution will go live according to the Go-Live date.	Go/No-Go Evaluation	Contractor & County
Go-Live	Contractor will prepare and deploy the Solution into the production environment to complete the Go-Live process. Solution deployment to production and completion of Go-Live activities is considered Solution Final Acceptance.	Completion of Go Live	Contractor & County
Warranty and Support	Contractor will provide additional resources and support during the warranty period including a support plan that outlines intake, triage, and assignment processes.	Support Plan	Contractor

Responsibilities

Contractor's Responsibility	County's Responsibilities
Support County's Performance of User Acceptance Testing (UAT) • Develop for the County agreed upon UAT test plans. • Record and report UAT results in a timely manner. • Trace UAT test plans, scripts, cases and acceptance criteria to the contracted requirements baseline and agreed-upon updates to this baseline (i.e., the Requirements Traceability Matrix). • Review changes, fixes, and enhancements with the participants in the UAT testing. • Correct identified defects and nonconformities in accordance with the acceptance process. • Compile and maintain Solution issue lists.	• Create UAT Test cases, scenarios and test scripts. • Perform UAT testing. • Log all UAT defects and issues to discuss the appropriate resolution as per the acceptance criteria. • Coordinate UAT execution and Acceptance procedures with the appropriate County participants. • Provide final sign off for Acceptance of the Solution prior to Go-Live.
Pre-Production/Production Deployment Phase • Submit a written deployment plan describing the plan to manage each implementation, for the County's approval. • Execute required data conversions or migrations including, but not limited to, baseline Subcontractor configuration tables and parameters, and ancillary supporting data as required by the Solution to function successfully in the production environment.	• Complete administrative setup tasks, such as detailing Users required. • If required, convert electronic data into a format usable by the new solution using a data conversion program. • Establish data to be used with the new Solution by producing new data and reconciling and mapping

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• Document data issues and provide to the County for resolution. • Conduct production pilot(s) (including "day in the life" simulations) and fine tune Solution as agreed appropriate. • Conduct end to end final validation of the operational architecture for the system. • Develop, and thereafter maintain and make available to the County, a knowledge base of documentation gathered throughout the Project's life and allow for re-use of such documentation for future Projects. • Conduct a post-implementation review process upon the completion of the Project which will include an analysis of how the business system(s) resulting from the Project compared to the post-deployment performance requirements established for such Project.	different data and database representations. • Execute Go-Live communication, stakeholder alignment and change management activities focused on adoption of ownership. • Collect, analyze, and address feedback for any additional requirements. • Conduct post "Go-Live" monitoring and problem resolution reporting. • Review and sign-off on all Deliverables.
Managing System Changes to any County system or environment • Establish, publish, and maintain a formal release calendar in consideration of the scheduled or required changes to the Solution. • Develop release packaging rules that include provisions for Contractor Solution and performance testing, County review and approval of Contractor results, provisions for County Acceptance or validation testing (depending on the nature of the change). • Establish operational procedures to backup or otherwise copy the Subcontractor environment prior to implementing the change. • Rollback or reversibility considerations including success/failure criterion applicable to the change. • Support structured code management, version control tools based on a supported change management suite. • Include a requirements traceability matrix for elements of a system change. • Support the County in validating that changes adhere to County security, privacy, and data handling policies. • Employ standard test beds or scripts that are utilized and extended for purposes of fully demonstrating completeness of adherence to business, functional and technical requirements at County required quality levels.	• Validate that all changes related to Subcontractor adhere to County security, privacy, and data handling policies. • If applicable, performance testing for high volume (transaction or data) transactions at the mutual agreement of the County and Contractor in consideration of the contents of a change.
Project Completion Activities and Final Documentation During the period immediately following Go-Live, Contractor will: • Provide adequate staffing (on site or available remotely) to resolve defects identified by the County during this period. • Prompt isolation, triage, and repair of Severity 1 or 2 issues. • Support the County to address issues raised from performance monitoring when there are statistically significant (i.e., +10%) deviations from actual production performance as compared to the Solution performance prior to the implementation of Contractor developed elements. • Verify that interfaces, and Solution functions perform and function as specified. • Compile final versions of the upgrade documentation, work products and delivery materials and locate/organize them as 'FINAL' on the County provided site.	• Conduct performance monitoring of the Solution so that there are no statistically significant (i.e., +10%) deviations from actual production performance as compared to the Solution performance. • Review and accept all final versions of the upgrade documentation, work products and delivery materials and locate/organize them as "FINAL APPROVED".

Agile System Acceptance

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Contractor will deploy the full functionality of the Solution from the UAT environment to the production environment in accordance with the deployment plan to be created by the Contractor. This deployment will include all configuration and customization of the Subcontractor platforms, in-scope data migration and integration. As a part of the deployment plan, Contractor will also validate that all UAT and User training is complete. The deployment plan will be a living document that details all critical steps needed to achieve Go-Live.

The purpose of the deployment plan is to finalize all Project activities across all phases and formally close the Project. As a part of this close-out phase all Deliverables will be delivered by the Contractor Project team and accepted, signed off by the County. Contractor will also leverage the Enterprise Value Delivery (EVD) technique for a proper execution and timely delivery of the Solution. As part of EVD, Contractor offers a consistent approach to build, test and deploy all the Solution components by providing the necessary tools and templates. During the close-out phase the project team will verify that the Project objectives were met, all the final Deliverables were delivered, signed off and Accepted by the County Project team, and conduct final knowledge transfer activities and capture any lessons learned. The close-out will also be characterized by the use of the Solution by all its Users without the support of the previous system. Prior to close-out, the parties will document any issues with any Solution component, including integrations. The parties will meet to review all issues to mutually determine if the Solution can proceed to Go-Live. In the event that it is determined that the Solution should not proceed to Go-Live, a mutually agreed upon remediation plan and timeline will be established and additional UAT (i.e. regression testing) will be conducted to identify the source of such issues. In the event that issues in the Solution occur within fourteen (14) calendar days following Go-Live, a mutually agreed upon remediation plan and timeline will be established and additional UAT (i.e. regression testing) will be conducted to identify the source of such issues and Final Acceptance shall not be granted by the County until such time as the Solution is performing full in conformance with the terms of this Agreement.

After the Solution operates in accordance with the agreed upon SLAs for a period of 14 calendar days, Contractor will provide a Final Acceptance Document to the County for approval. This document will include a final Requirements Traceability Matrix identifying all requirements allocated to the current in production Solution. Once the County has accepted this Deliverable, the maintenance and operations phase will begin.

Activities and Outputs

Key Activity	Description	Outputs	Responsibility
Develop Deployment Complete Document	After the deployment is complete, Contractor will create a deployment complete document that confirms all business and technical requirements were delivered by the Solution in the production environment.	Deployment Complete Document	Contractor
Verify Acceptance of Final Project Deliverables	Verifies that all deliverables have been signed-off and accepted by the County.	Final Deliverable Verification	Contractor
Develop Solution Acceptance Document	After operating the Solution for 30 days in accordance with the Appendix C (Subcontractor Service Level Agreement) SLAs, this document will be submitted for approval along with a final Requirements Traceability Matrix. Sign-off of this document by the County constitutes acceptance of the Solution and triggers the beginning of ongoing maintenance and operations.	Solution Acceptance Document	Contractor
Conduct Post Project Lessons Learned Session	A session to review Project processes and determine the best practices for future Projects. Contractor, along with the County, will conduct the post-project Lessons Learned Session. A document of these lessons learned will be created as part of this process.	Lessons Learned Document	Contractor
Archive Project Documents Securely	After implementation, the Project Documentation and Deliverables will need to be securely archived.	Archive Deliverables	County

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Responsibilities

Contractor's Responsibilities	County's Responsibilities
• Develop a Deployment Completion Document to verify that all the functional and technical requirements were delivered by the Solution components deployed in the production environment. • Verify the delivery and acceptance the final project deliverables • Develop a Solution Acceptance Document • Conduct Post Project Lessons Learned and share it with the County team	• Review, sign off and accept the Deployment Complete Document • Review, sign off and accept all the other formal project deliverables • Review, sign off and accept the final solution acceptance document

2.10 Key Assumptions & Considerations

The following assumptions apply to this Agreement. They are in addition to other assumptions found throughout this document.

- Work will be performed both onsite (in County offices) as well as offsite. Onsite work scheduling will be subject to COVID-19 related restrictions.
- The County will offer support to the Contractor team in accordance with the mutually agreed upon Project plan, to be finalized upon award.
- Testing activities as described in this response (in particular User Acceptance Testing and Integration testing) requires the involvement of County resources. County resources would be responsible for completing testing and providing feedback within the agreed upon time frames as called out in the Project plan. Training activities as described in this response require the involvement of County resources.
- Business Process Re-engineering and Service Request rationalization efforts are not included in Contractor pricing except to the extent as described herein. While Contractor would provide consulting support and expertise to process re-engineering and rationalization efforts, county SMEs and Project teams will need to own executing and formalizing the improvements.
- Print formats are limited to Subcontractor's default print capabilities. Creation of custom print views, scheduling print jobs or batch printing is not in scope.
- Web browser compatibility for Subcontractor is limited to N-1 versions.
- ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility. Contractor's Capsule conforms to 508 standards.
- Data Migration will be done using data migration and import tools after the County prepares a clean data load of legacy service requests using the supplied file format. Contractor's Solution comes with data migration capabilities out of the box and this is a normal activity on many projects. To migrate the legacy data to Subcontractor, Contractor data engineering team would need access to the SMEs from the County side, access to the staging and production database and separate sandbox environments to test the data migration scripts before they are migrated to the production environment.
- Contractor will develop up to 5 reporting dashboards with up to 10 reports per dashboard in addition to the standard reports that come with the Capsule. All reports and dashboards will be developed using standard Subcontractor reporting capabilities. County administrators will be trained how to build additional dashboards and reports as required.
- Subcontractor storage limits apply In accordance with Appendix B, Section 22. The County can purchase additional cloud-based storage from Subcontractor or other cloud storage providers (e.g. Cloudinary, AWS or use their existing storage solutions)
- All required Subcontractor licenses will be available for Contractor use at the Project kick-off.
- Contractor maintains its IP using its global delivery model. The location of work to maintain the IP can be separated from configuration, testing and deployment for specific clients.
- Platform security provided by Subcontractor in conformance with Exhibit C (Security Matrix). Relevant security plans and documentation to be provided by Subcontractor at the County's request.
- Offline mobile capabilities are not supported in the current version of the Capsule.
- The Capsule constituent-facing self-service Mobile app and web portal will be provided as is. Any enhancement requirements, other than the ones agreed to in accordance to the following exhibits: Exhibit A (Functionality Matrix), Exhibit B (Interface Business Use Case Development Matrix / Integration Matrix), and Exhibit C (Security Matrix), and discussed during the discovery session could be addressed as possible enhancement in future releases of the product.
- For the constituent mobile app, if the County would like to add the 311 Vision capability to the application, there would be additional implementation costs to configure this feature when the County is ready to provide this optional service capability.

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Standard use of Contractor Constituent Mobile app is included with the Capsule Subscription.

- County will have a Full sandbox Subcontractor environment (Org) so that dev and User will be able to test it in separate environments.
- At least 4 sandbox environment Orgs (including one full sandbox) are needed for implementation.
- Contractor shall use Prodly as an SR migration tool between non-production and production Orgs.
- CTI integration with the County telephony solution will require the County to purchase the connection product as an Additional Product in accordance with Article 17 at the cost outlined in Appendix D. When ready, the County and Contractor can work together to determine the correct connector for the County to purchase.
- No multi language support is included in our implementation estimates – Contractor will configure SR types in English and the County administration team can copy and edit these SR types in additional languages as needed. Subcontractor and Contractor will work with the County to develop a long-term approach to both internal use and public facing self-service options for multi-lingual support across all interaction channels during the life of the Project.
- Decision to implement Private Sharing will be decided in discovery phase and Project Plan will be adjusted accordingly
- Push notifications are out of scope
- Implementing SMS Texting will be done using Subcontractor Digital Engagement, the County will need to procure or use an existing SMS short code if one is needed.
- Teamsite Content Management System integration will use existing Subcontractor /Mulesoft APIs
- Seven (7) County systems will be integrated with the Solution as detailed in Exhibit B (Interface Matrix) of each integration in this SOW. Each integration requirement will be reviewed with the County SMEs and admins for each target system and documented during discovery, and then implementation approaches for each integration will be configured for those SR types using the integrations. The County's external systems should be able to consume APIs that conform to Subcontractor/Mulesoft API Standards. For each integration, Contractor will consult with the County IT team on how the target system can consume and utilize the provided APIs, and Contractor will perform the SR configuration necessary to support the integration use case from the Capsule side of the API.
- Integration with existing Marketing Cloud and Social Media implementation will be used to provide Digital Engagement across channels and outbound campaigns if the County would like to implement those functions.
- Contractor will provide the Mobile Worker App as is.
- Service Request submission/status check is available using Web, phone, Text, chat/chatbot, and public mobile app only. Using Voice (Alexa, Siri, Google etc.), and Social submit and check Service Request status is out of scope for this implementation but can be purchased as Additional Work through the County's.
- Implementation of Slack or Tableau licenses included in the proposed Subcontractor licensing bundle is out of scope for the Contractor for this implementation.

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APPENDIX B – SPECIAL PRODUCT TERMS

In addition to the general terms contained within this Agreement, the Contractor has provided third party products from its Subcontractor in relation to the implementation and usage of Solution to conform to the requirements outlined in the submission of the Contractor's proposal to the County. As such, the Subcontractor has provided additional terms and conditions related to those third party products known as ("Product Special Terms"). During the term of the Agreement, the Subcontractor in conjunction with the Contractor grants the County a limited, non-transferable, non-exclusive license to use the third party products in accordance with the terms of this Appendix B (Product Special Terms) and Attachment 10, Salesforce Terms of Use. Such license shall not be construed to be any license to source code for any component of the Solution. Terminology related to the products can be found in Attachment 1 (Product Terms Directory). Should the terms in Attachment 1 conflict with the defined terms in Article 1 of this Agreement or the Scope of Services in Appendix A, the definitions in Article 1 and Appendix A control.

1. Einstein Features

Subcontractor may access County Data submitted to the Einstein features for the purpose of improving and training services and features the County may access, and County instructs Subcontractor to process its County Data for such purpose. County retains all ownership of its County Data and Subcontractor retains all ownership in and to aggregated machine learning results.

2. Service Cloud Einstein

The County agrees that the intended use of the Service Cloud Einstein's Analytics features is to report on Service Cloud data in accordance with the Service Analytics Documentation (the "Intended Use"). This does not include access to features or analytics assets (e.g. applications, dashboards, lenses, or datasets) that are part of the Analytics Platform products. The County may not (i) use Service Cloud Einstein's Analytics features to build custom applications and dashboards, (ii) upload, access, or connect external data sets that are not already part of the Service Cloud Einstein Services, using available APIs for external data in Analytics Platform API or any program or tools using such API, (iii) use Service Cloud Einstein's Analytics features for purposes other than its Intended Use. Each Service Cloud Einstein Services subscription permits County to enable the automatic predictions feature for up to 2,000 Cases per Org per month. Unused quantities are forfeited at the end of each month and do not roll over to subsequent months. For the avoidance of doubt, the monthly limit on automatic predictions described herein does not apply to predictions manually reviewed by agents. County understands that the foregoing limitations are contractual in nature (i.e. they are not limited as a technical matter in the Services), and therefore agrees to strictly monitor its Users' use of such subscriptions and enforce the applicable restrictions. Subcontractor may monitor County's usage of the Service Cloud Einstein's Analytics features at any time through the Services. Should any review reveal that County has enabled the automatic predictions feature for more Cases than permitted hereunder, the parties agree to negotiate in good faith to establish a cost for additional predictions. The County acknowledges that Subcontractor may access County Data submitted to services and features branded as Einstein for the purpose of training and improving similar or related services and features, and County instructs Subcontractor to process its County Data for such purpose. Subcontractor retains all right, title, and interest in and to all system performance data, machine learning algorithms, and aggregated results of such machine learning. Subcontractor will not share County's Data with any other customers.

The County understands that the foregoing functionality restrictions are contractual in nature (i.e., these restrictions are not enforced in the Services as a technical matter) and therefore agrees it is responsible for monitoring its Users' use of such subscriptions and for enforcing such use restrictions. Subcontractor may review County's use of such subscriptions at any time through the Services.

3. Digital Engagement - Additional Conversations

Includes 100 additional conversations per month. Unused conversations are forfeited at the end of the annual Subscription Term and do not roll over to subsequent months. The County understands that the foregoing functionality restrictions are contractual in nature (i.e., these restrictions are not enforced in the Services as a technical matter) and therefore agrees it is responsible for monitoring its Users' use of such subscriptions and for enforcing such use restrictions. Subcontractor may review the County's use of such subscriptions at any time through the term of the Agreement.

4. Digital Engagement - Additional Bulk & Triggered Messages

Includes 1000 additional triggered and bulk messages. Unused triggered and bulk messages are forfeited at the end of the renewal date in accordance to Section 4 of Appendix D (Payment Schedule),and do not roll over to subsequent months. The County understands that the foregoing functionality restrictions are contractual in nature (i.e., these restrictions are not enforced in the Services as a technical matter) and therefore agrees it is responsible for monitoring its Users' use of such subscriptions and for enforcing such

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use restrictions. Subcontractor may review County's use of such subscriptions at any time through the Services.

5. Business Rules Engine

This product is included in the Licensed Software, but will not be implemented under Appendix A. In the future, should the County initiate use of this product, the Contractor or Subcontractor shall notify the County if usage exceeds the capacity of the Subscription. If overage is excessive and the County fails to monitor usage and take corrective action in the future, the Contractor reserve the right to bill for such overage fees. Overage fees are billed monthly in arrears and due in accordance with Article 22 (Method and Times of Payment).

6. Subcontractor Shield

In order to use the Einstein Data Detect and Code Spec features, the County's system administrator must first install the managed package available at (Salesforce Login) https://sfdc.co/install-datadetect.

7. Digital Engagement

The Contractor acknowledges and agrees to indemnify, defend, and hold Subcontractors, aggregators (as defined in the applicable Security, Privacy, and Architecture Documentation), and their respective affiliates harmless from and against any claim or loss arising from or relating to County's use of the Messaging Services or County Data sent via the Messaging Services.

Each Messaging subscription entitles the County to: (i) 25 conversations per month, aggregated over the annual subscription period; and (ii) 1000 Triggered & Bulk Messages for use in one Subcontractor instance during the annual Subscription Term. Notwithstanding anything to the contrary in the Agreement, a detailed description of conversations and how they may be used can be found at Attachment 2. (Digital Engagement Rate Pricing Sheet) including the corresponding multipliers by region. In order to set up message types, including enablement of phone number(s) and over the top ("OTT") messaging identities (example: Facebook Messenger), as applicable, and to complete message type set up, County shall follow the setup instructions in the Help section at

(https://help.salesforce.com/articleView?id=live_message_setup_flow.htm&type=5)

To complete SMS message type set up, County shall follow the Messaging Set Up Instructions located at Attachment 3 (LiveMessage and Messaging Set Up Instructions)The rates payable by County for Messaging are inclusive of all amounts that Salesforce must pay to any U.S. or foreign government, regulatory body, agency, commission or quasi-governmental body as a result of Salesforce providing Messaging other than U.S. sales taxes that Salesforce determines are required to be collected from County.

8. Customer Community for Public Sector - Logins

Subscriptions to Customer Community for Public Sector - Logins may not be purchased for use by County employees or other personnel of the County. The County may only assign Customer Community for Public Sector permissions to a User for whom the County has purchased a Customer Community for Public Sector subscription. Each Customer Community for Public Sector - Logins subscription entitles the Permitted Users access to all such Communities within the same Org up to the number of log-ins per calendar month ordered (the "Permitted Number of Monthly Logins"). The beginning and end of each calendar month will conform with U.S. Pacific Time. The County shall assign each Permitted User a User profile or permission set that permits access to no more than 10 custom objects in each applicable community. Subcontractor will provision 20 User subscriptions for each of the Permitted Number of monthly logins; subject, however, to the limitations on the aggregate number of User subscriptions per Org set forth in the Documentation ("Permitted Users"). The County understands that the above limitations are contractual in nature (i.e., they are not limited as a technical matter in the Service) and therefore agrees to strictly review its Users' use of such subscriptions and enforce the limitations set forth herein. Subcontractor may review County's use of the subscriptions at any time through the Service. Unused logins are forfeited at the end of each anniversary of the annual renewal date in accordance with Section 4 of Appendix D (Payment Schedule), and do not roll over to subsequent months.

9. Public Sector Foundation MI Tier 2

Use of Public Sector Foundation MI Tier 2 is subject to the following limitations: (i) Users may not access or use the following objects: Campaigns, Leads, Opportunities, Quotes, Sales Contracts, Service Contracts, Solutions; (ii) Users may not access or use the following User features: Live Agent, Marketing (Manage Campaigns), Omnichannel, Social Starter; (iii) Users may not access or use the following User Permissions: Forecasting, Opportunity Splits, Opportunity Teams, Territory Management; and (iv) use of the Services is subject to the additional functionality restrictions applicable to Service Cloud (by edition) set forth in Attachment 4 (Contractual

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Restrictions for Sales Cloud, and Sales & Service Cloud) The County understands that the above limitations are contractual in nature (i.e., these limitations are not enforced in the Services as a technical matter) and therefore agrees to strictly review its Users' use of such subscriptions and enforce such limitations. Subcontractor may review County's use of such subscriptions at any time through the Services.

10. Survey Response Pack (1,000)

Each Survey Response Pack (1,000) subscription provides 1,000 additional Survey Responses to be used by the County during each annual Subscription Term. A Survey Response is created when an individual, including but not limited to a User, responds to one or more questions from the survey. Survey Responses must be used before the Order End Date in this Order Form and any unused Survey Responses do not rollover to a subsequent Order Term. Survey Responses must be used during the annual Subscription Term and any unused Survey Responses do not rollover to a subsequent renewal term. County will be invoiced for any applicable taxes or overage

fees as set forth in the Agreement. Usage will be calculated based on Central Standard Time. Additional Survey Responses may be purchased at any time during the renewal term; however, if County fails to order additional Survey Responses prior to exhausting its then-current unit volume, the applicable overage rates for such units as set forth in this Agreement will apply. Overage fees will be billed monthly, in arrears. Overage fees will be billed monthly, in arrears, for each instance that County exceeds its then-current unit volume. County understands that the above limitations are contractual in nature (i.e., these limitations are not enforced in the Services as a technical matter) and therefore agrees to strictly review its Users' use of such subscriptions and enforce such limitations. Subcontractor may review County's use of such subscriptions at any time through the Services.

11. Signature Success

Signature Success is made available in accordance with the terms described at Attachment 5 (Success Plans).

12. Heroku - 1 Dyno

Each Heroku - 1 Dyno Unit (Per Month) subscription includes 750 Dyno hours per month. County understands that the above limitation is contractual in nature (i.e., this limitation is not enforced in the Services as a technical matter) and therefore agrees to strictly review its Users' use of such subscriptions and enforce such limitation. Subcontractor may review the County's use of such subscriptions at any time through the Services. If in any calendar month, County exceeds its permitted number of Dyno hours, Subcontractor reserves the right to charge County list price for as many additional Heroku - 1 Dyno Unit (Per Month) needed to cover all Dyno hours consumed in excess of the permitted number of Dyno hours. Such additional fees will be charged to County monthly in arrears via the billing or payment method specified above.

13. Public Sector Foundation - Advanced Unlimited Edition (Tier 1)

In order to access OmniStudio features and functionality, County's system administrator must first install the latest OmniStudio managed package available in Attachment 6: (OmniStudio Release Summary for Installation and Upgrade). The County must be using a version of the managed package that is no more than two releases behind the then-current generally available version of the managed package (the "GA Version") in order for Subcontractor to provide support. Subcontractor will not provide support for Omnistudio features and functionality to County (including any patches) for any managed package that is more than two releases behind the GA Version. If Public Sector Foundation - Advanced subscriptions are used in the same Org as Employee Experience for Public Sector subscriptions, Public Sector Foundation Advanced subscriptions must be restricted to internal operations use cases only. "Org" means a unique instance of the Services, i.e., a separate set of County Data and County-specific Service customizations held by Subcontractor in a logically separated database (i.e., a database segregated through password-controlled access).

14. Emergency Program Management (2.0) (Optional)

In order to access Emergency Program Management Services, the County's system administrator must first install the managed package via the following link http://industries.force.com/publicsector.

15. Tableau CRM for Public Sector Solutions (Optional)

The County may only provide access to the Einstein Recommendations feature associated with the Tableau CRM for Public Sector Solutions Services to Users that have an active Tableau CRM for Public Sector Solutions subscription or a Tableau CRM Plus subscription. Tableau CRM for Public Sector Solutions subscriptions may not be assigned to Communities Users. The County understands that the above limitations are contractual in nature (i.e., these limitations are not enforced in the Services as a technical matter) and therefore agrees to strictly review its Users' use of such subscriptions and enforce such limitations. Subcontractor may

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review County's use of such subscriptions at any time through the Services.

The County acknowledges that Subcontractor may access County Data submitted to services and features branded as Einstein for the purpose of training and improving similar or related services and features, and County instructs Subcontractor to process its County Data for such purpose. Subcontractor retains all right, title, and interest in and to all system performance data, machine learning algorithms, and aggregated results of such machine learning. Subcontractor will not share County's Customer Data with any other customers.

The Analytics Apps and Templates functionalities included as part of the Tableau CRM for Public Sector Solutions Services are only available in English. Tableau CRM for Public Sector Solutions includes Tableau CRM, Einstein Discovery, and Einstein Predictions Builder

SPECIAL TERMS SPECIFIC TO MULESOFT SUBSCRIPTIONS

Notwithstanding anything to the contrary in the Agreement, MuleSoft subscriptions under this Agreement shall not automatically renew, and therefore shall terminate at end of the applicable Subscription Term.

16. MuleSoft Services

The Software and/or Cloud Offerings, standing alone, constitute MulesSoft Services. Additional details regarding such MuleSoft Services are provided in the Anypoint Platform Subscription Plan details, which is accessible in Attachment 7 (Mulesoft Subscription Plans). New Subscription plans may be added when new versions become available.

17. MuleSoft Use by Affiliates

Subject to the terms and conditions of this Agreement, the County's Affiliates may use the subscriptions ordered by the County herein for the duration of the Agreement and for so long as they remain Affiliates, provided that: (a) such use is for the internal business operations of the County and/or its Affiliates and does not create any third party beneficiary rights for the County's Affiliates; (b) the County remains responsible for each such Affiliate's compliance with the terms and conditions of the Agreement; (c) the County provides Subcontractor at least 30 days' advance written notice (email permitted) of each such Affiliate usage; (d) subject to the following subsection (e), use of the subscriptions by all Affiliates and the County in the aggregate must be within the restrictions in this Agreement; and (e) notwithstanding the foregoing, Affiliates may not use the County's rights under any unlimited Core or VCore (or other unlimited quantity) license or subscription unless Affiliate usage is specifically designated in the Agreement.

18. MuleSoft Software

MuleSoft Software shall be subject to the terms outlined in Attachment 8 (Order Form Supplemental for MuleSoft Software) which is hereby made part of this Agreement.

SPECIAL TERMS SPECIFIC TO SLACK

19. Slack

Search Optimization Authorization. County acknowledges that Subcontractor, including Slack, may access County Data submitted for the purpose of improving and training services and features County may access, and County instructs Subcontractor to process its County Data for such purpose. The County retains all ownership of its County Data and Subcontractor retains all ownership in and to aggregated machine learning results.

Slack Brand Guidelines. Notwithstanding anything to the contrary contained in the Agreement, the County will ensure that any use of Slack's trademarks, trade names, logos or services marks permitted under the Agreement will be in accordance with Slack's brand guidelines, outlined in Attachment 9 (Slack Media Kit).

Use Restriction. Notwithstanding anything to the contrary herein or in the Documentation, the number of users the County is permitted to have on its workspace shall not exceed the applicable good faith projection of user numbers included herein by more than 5%. The County understands that the above limitation is contractual in nature. Therefore, County agrees to strictly monitor County's users' use of such subscriptions. County agrees to notify Slack if subscriptions are used in breach of the restrictions included herein. Slack may audit County's use of subscriptions at any time through the Services. Should any audit reveal any unauthorized use of the subscriptions in violation of this limit, County agrees to discuss issuing a contract modification to Contractor, for the price of all of the subscriptions

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showing unauthorized use, beginning with the date of the first violation through the end of the then current subscription term.

Slack SLA.The service level agreement outlined in Appendix C shall apply.

Slack Support. Except to the extent otherwise specified herein, the support applicable to the Slack Services ordered in this Agreement during any Subscription Term is described at . No other support plans offered by Subcontractor or any of its Affiliates apply to any Slack products ordered under this Agreement.

Slack Usage Guides and Policies. For clarity, for purposes of the Slack Services included in this Agreement, Slack's usage guides and policies are accessible via www.slack.com/help.

SPECIAL TERMS PERTAINING TO CARAHSOFT WHEN USED AS A SUBCONTRACTOR

The County agrees that Attachment 10 (Carahsoft Salesforce Service Terms) and Attachment 11 (Carahsoft Government Cloud Terms) are made part of the Agreement.

SPECIAL TERMS SPECIFIC TO CAPSULE

20. Capsule License Subscription (per year costs)
Contractor's Capsule site license subscription is based on the population of the County and number of departments using the Capsule (purchased from Contractor) and it includes:

- Agent Console
- Department Console
- Service Request Configuration Console
- Open311 API
- ESRI GIS/CTI ready Integration
- Self-service Web Portal and Self-Service Constituent Mobile App
- Mobile Worker App - The 311 Capsule site license includes 25 Mobile Worker app licenses to cover County staff and field staff who want to use the 311 Capsule app in the field as needed.

Contractor's Mobile Worker App subscription is for mobile County staff that work in the field and is priced in user number ranges to allow flexibility for how the County would need to use it to provide County staff in the field access to the Solution. As needed, it would be very easy to quickly expand the Mobile Worker app use in the event of emergency events or high demand situations, much easier than purchasing and then canceling Subcontractor full use licenses.

21. User Subscription License Methods
To provide County-wide coverage for most users, desktop users would need 311 Capsule subscriptions, while Contractor's Mobile Worker App can meet the needs of most County staff who need to create new requests, view existing requests in their queue, work and close any assigned cases or activities from their connected mobile device. Solution subscription user counts with a blend for the whole County include:

- **1300 PSF Desktop Users** - for County Users who would need to run Capsule agent console, department console, Reports, Configuration, and System Administration consoles on a desktop workstation. This license is priced per named user and includes the Subcontractor PSF Tier 1 250 licenses by 311 staff and 1050 PSF Tier 2 licenses used by remaining County employees. Two PSF licenses will be reserved for the Mobile Worker App assignment, and one PSF license will be reserved for the Contractor Managed Service Support team at Go Live.

- **25 Mobile Worker App Users –** for County users who would need to monitor their assignments to work service request cases, complete activities, and closeout cases, and who would need occasional access to create new service request cases. This license is based on ranges of users and provides wide flexibility to offer low-cost access to the Solution for most all County users using their connected iOS or Android mobile device.

- **Knowledge Administrator Users** - for County users who would need to author and publish knowledge base articles

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(included in Public Sector Foundation Tier 1 Unlimited Edition licenses).

- **Digital Engagement and Einstein** - for omni-channel engagement with County constituents for chat, chat-bots and SMS inbound and outbound text messages.

22. **Self-Service License Methods** - For constituents to access the self-service components of the Solutions, Contractor uses the Subcontractor Customer Community portal that allows for three different types of users from the public:

    - **200,000 Portal Account Registered users** - for constituents who want to create a CRM self-service portal login account.

      This license is priced per constituent log-in to the portal per month.

    - **Unlimited Portal Unregistered users** – for constituents who will provide their contact information when making service requests but will not create a user login account. This license is for unlimited use by portal users who do not log in.

    - **Unlimited Anonymous Unregistered users** - for constituents who want to remain anonymous when making service requests or viewing self-service portal information. This license is for unlimited use by portal users who want to be anonymous.

    - **Constituent Mobile App users** - there are no limits to the number of constituents who can use the mobile self-service app for iOS and Android. Registered constituent users of the mobile app are the same as the registered constituent users of the Web Portal.

SPECIAL TERMS SPECIFIC TO STORAGE

23. Storage is divided into two categories: file storage and data storage. File storage includes files in attachments, the documents tab, the files tab, the file field, Content, Chatter (including user photos), and Site.com assets. Data storage includes the following entities/records stored within the Licensed Software: Accounts, Article types, Article type translations, Campaigns, Campaign Members, Cases, Case Teams, Contacts, Contracts, Custom objects, Data Translations, Email messages, Events, Forecast items, Google docs, Ideas, Leads, Notes, Opportunities, Opportunity Splits, Orders, Quotes, Quote Template Rich Text Data, Solutions, Tags: Tag applications, Tags: Unique tags, Tasks and all objects tied to Field Service enablement (for a full list, check Field Service Developer Guide)

    Storage allocation is per Salesforce edition and the number of standard licensed users in your organization, as outlined in Appendix D.

    For file storage, all editions are allocated 10 GB of file storage per org. Orgs are also allocated 2 GB of file storage per user license. For example, an Unlimited Edition organization with 600 users receives 10 GB, plus an additional 1,200 GB of file storage (2 GB per user multiplied by 600 users).

    For data storage, all editions are allocated 10 GB for data storage, plus incrementally added user storage. For example, an Unlimited Edition organization with 10 users receives 10 GB, plus 200 MB (20 MB per user multiplied by 10 users).

    Big Object Storage is an additional method of storage that can be added on. Contact Manager, Group, Enterprise, Performance, Unlimited, Developer, and Personal editions are allocated storage for 1 million big object records per org. Big object storage is calculated asynchronously, so new records aren't immediately reflected.

    The breakdown of storage allocation for each edition is described here: https://help.salesforce.com/articleView?id=overview_storage.htm&type=5. Additional storage can be purchased, or files can be exported and archived outside of Salesforce, thus freeing up file storage space.

    Optionally, Salesforce can access external storage providers (Google, DropBox, Box, SharePoint). This scheme allows the customer to leave existing files in place while attaching references to them to Salesforce records. extra storage for community

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users that gets pooled with org storage above: https://help.salesforce.com/s/articleView?id=sf.users_license_types_communities.htm&type=5

OPTIONAL SERVICES

24. Subcontractor Expertise Hours

The remote Subcontractor Expertise Hours (SEH) subscription term starts on the first day of the Subscription Term, as outlined in Article 7. The SEH will be comprised of one or more resources filled by multiple individuals throughout the term based on subject matter expertise. The SEH services will be provided Monday through Friday, during the hours of 9 a.m. to 5 p.m. EST. County acknowledges that all SEH resources will not be available on administrative days, regional public holidays and paid time off. The SEH subscriptions may be applied only to SEH activities and not toward the purchase of any other Subcontractor product or service (including without limitation product subscriptions, support or professional services). SEH is an advisory service that may include, but not be limited to, topics such as business and IT collaboration, solution planning & design, architecture, adoption, value realization, project portfolio management, and Subcontractor solution delivery. SEH services shall not result in a transfer or assignment of intellectual property rights between the parties. SEH services are provided both remotely and onsite at the County's location subject to mutual agreement of the County and Subcontractor. The SEH subscription is non-cancelable and fees paid are nonrefundable. If County does not use the maximum number of hours of SEH services purchased during a Subscription Term, unused hours are forfeited at the end of such Subscription Term and do not roll over to subsequent subscription terms and fees paid by County may not be refunded, extended, rolled over to another subscription period, or applied to another account or SFDC product or service. The SEH services provided pursuant to this Agreement may include, at County's direction, provision of software development and configuration services ("Coding Services") provided that Coding Services (if any) shall be limited to software coding and configuration, and shall not include any services related to testing, QA or deployment of code to production. Testing, QA and deployment to production of anything created by SFDC as part of the Coding Services shall be the sole responsibility of County. Upon County's payment of fees due for SEH, SFDC grants County a worldwide, perpetual, non-exclusive, non-transferable, royalty-free license to copy, maintain, use and run (as applicable) solely for its internal business purposes associated with its use of the Services any code provided as a result of the Coding Services ("Contract Property"). SFDC and County each retains all right, title and interest in its respective intellectual property and SFDC retains all ownership rights in the Contract Property

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APPENDIX C – SUBCONTRACTOR SERVICE LEVEL AGREEMENT

100% Multi-Tenant, Cloud Application - Subcontractor offers market leading Platform as a Service (PaaS) and market leading Software as a Service (SaaS) solutions. Salesforce is a multi-tenant, cloud-based web application. No additional software or infrastructure is required. Subcontractor hosts the entire Solution, thus freeing up the County to manage its mission, not manage an infrastructure solution. Additionally, Subcontractor is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE, Edge). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices. As long as the user can access a supported browser to login into the Subcontractor site they will not require local administrator rights to run the application.

The fully documented list of supported browsers and mobile devices for the full Subcontractor site and Subcontractor Mobile is available in the following articles in online our Help & Training Portal: https://help.salesforce.com/HTViewHelpDoc?id=getstart_browser_overview.htm&language=en_US and https://help.salesforce.com/articleView?id=sf1_requirements.htm&type=0.
Salesforce can be configured to support HTTPS and HSTS. Steps to set up this configuration are documented here: https://help.salesforce.com/articleView?id=browser_security.htm&type=5.

Subcontractor is committed to providing excellent service reliability, and is pleased to offer Contractor (for the benefit of the County) a service level commitment of 99.7% general availability that applies to the on-line Services the County purchases under this Agreement that Subcontractor makes generally available to its customers on or after the SLA Effective Date, (collectively "SLA Services"), subject to the provisions of Appendix B (Special Product Terms) and applicable Attachments.

Subcontractor will provide the following as part of Signature Success subscription:

- Designated Technical Account Manager
- Real-time monitoring from Proactive Services Engineers
- Fastest response time (within 15 minutes) for business-stopping issues and highest support expertise
- Technical health reviews, key event management, and optimization for issue prevention
- Pre- and post-go-live support and guidance to help innovate and scale faster
- 24/7/365 Day Support

Further details of this commitment are described in the Salesforce SLA form, which is located below. The SLA from Subcontractor meets the spirit and purpose of the County's requirements. Characteristics of Subcontractor services include: major releases historically 3X/yr (5X/year for Marketing Cloud); maintenance generally 2X/month; commercially reasonable efforts to perform planned maintenance during the times as set forth in the Maintenance Windows schedule; emergency releases as-needed; and deploy patches & emergency releases off-peak hours and without downtime when possible. Daily service availability data is posted on: http://trust.salesforce.com. Subcontractor's multi-tenant cloud service provides redundant data protection, advanced facilities protection, and data recovery plan.

This Appendix C (Service Level Agreement) ("**SLA**") is subject to and made a part of the Agreement to which this SLA is attached, (the "**Agreement**") and is effective as of the date that it is attached to the Agreement (the **"SLA Effective Date"**). the terms of this SLA apply to the on-line Services the County purchases under this Agreement that Subcontractor makes generally available to its customers on or after the SLA Effective Date, (collectively "**SLA Services**"), subject to the provisions of Appendix B (Special Product Terms) and applicable Attachments.

1. Availability. Subcontractor shall make each SLA Service available 99.7% of the time, except as provided below. Availability will be measured for each SLA Service individually and will not be aggregated across all SLA Services. Availability will be calculated per calendar quarter, per SLA Service, as follows:

$$\left[\left(\frac{total - nonexcluded - excluded}{total - excluded}\right) \bullet 100\right] \geq 99.7\%$$

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Where:

- *total* means the total number of minutes in the calendar quarter;
- *nonexcluded* means downtime that is not *excluded*; and

- *excluded* means:
  - Any planned downtime of which Subcontractor gives 24 or more hours' notice in accordance with the Agreement, via a conspicuous on-screen message in the applicable SLA Service and/or on the applicable Trust site (as may be identified in the Maintenance Window schedule). Subcontractor will use commercially reasonable efforts to schedule all planned downtime during the times as set forth in the Maintenance Windows schedule for the SLA Services identified therein.

  - Any unavailability caused by circumstances beyond Subcontractor's reasonable control, including, without limitation, acts of God, acts of government, flood, fire, earthquakes, civil unrest, acts of terror, strikes or other labor problems (other than those involving Subcontractor employees), denial-of-service attacks, or third-party Internet service provider failures or delays.

  - Any failures, downtime or delays by a Non-Subcontractor Application.

For any partial calendar quarter during which the County subscribes to an SLA Service, availability will be calculated based on the entire calendar quarter, not just the portion for which the County subscribed.

2. Remedies. Should Subcontractor fail to make any SLA Service available as set forth in Section 1 above in a calendar quarter, the County may continue to use such SLA Service but receive a refund for one full day of subscription fees for each active subscription on the affected SLA Service instance in that quarter, for each full or partial hour of SLA Service unavailability below the percentage specified in Section 1 above. In no case shall the total refund for unavailability in any quarter aggregated across all SLA Services exceed the lesser of $250,000 or 33% of the subscription fees paid by the County for all SLA Services for such quarter. Should Subcontractor fail to make any SLA Service available as set forth in Section 1 above in two consecutive calendar quarters, or should Subcontractor fail to make any SLA Service available less than 98% of the time in a single quarter (consistent with the calculations set forth in Section 1, above), the County may, in lieu of receiving the above-described refund for the second quarter (or single quarter as applicable), terminate its subscriptions to all the SLA Services of the type that were unavailable by providing notice of termination in accordance with Section 3 below, in which case Subcontractor will refund to the County any prepaid fees for the remainder of such SLA Services subscription term(s) following the date of termination.

3. Reporting, Claims and Notices. To claim a remedy under this SLA, the County shall send Subcontractor a notice, via email addressed to sla@salesforce.com, containing the following details:

- SLA Service(s) that form the basis for the claim;

- Billing information, including company name, billing address, billing contact and billing contact phone number;

- Downtime information with dates and time periods for each instance of downtime during the relevant period by applicable SLA Service; and

- An explanation of the claim, including any relevant calculations.

Claims may be made on a calendar-quarter basis only and must be submitted within 60 calendar days after the end of the applicable quarter, except where an SLA Service subscription ends on a date other than the last day of a calendar quarter, in which case any claim related to that subscription must be submitted within 60 calendar days after the subscription end date.

All claims will be verified against Subcontractor's system records. Should Subcontractor dispute any period of unavailability alleged by the County, Subcontractor will provide to the County a record of the SLA Service availability for the applicable period. Subcontractor will provide such records only in response to claims made by the County in good faith.

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4. General: For the avoidance of doubt, Non-Subcontractor Applications, Content, and Services designated in writing as beta, limited release, developer preview, development or test bed environments, or by descriptions of similar import, and with respect to the Heroku Services:

- Actions initiated by Customer with the Heroku Services, such as application deployment.
- Applications not using a Heroku provided Postgres Dedicated Database, as outlined http://addons.heroku.com/heroku-postgres.
- Heroku APIs.

Subcontractor shall have no obligations under this SLA during any period in which the parties agree that the County is in material breach of the Agreement, including any period in which the County has failed to meet its payment obligations thereunder. The SLA obligations shall be immediately reinstated upon cure of such material breach.

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APPENDIX D – PAYMENT SCHEDULE

1. Payment Schedule

Type	Invoice Milestone	Amount
Contractor Implementation Professional Services	**Milestone 1a:** Capsule Installation	$45,000.00
	Milestone 2: Project Plan Approval	$45,000.00
	Milestone 3: Completion of Discover & Align Phase	$110,000.00
	Milestone 4: Completion of 50% of SR Types Configuration	$100,000.00
	Milestone 5: Completion of SR Types Configuration	$110,000.00
	Milestone 6: Completion of Integrations	$140,000.00
	Milestone 7: Completion of Reports and Dashboards	$100,000.00
	Milestone 8: Completion of Train-the-Trainer Training	$45,000.00
	Milestone 9: Completion of UAT	$85,000.00
	Milestone 10: Deploy to Production Environment	$119,000.00
	Milestone 11: Go Live	$100,080.00
		$999,080.00
Year 1 Solution Subscription License and Support Cost	Milestone 1b: Project Kickoff	$1,917,099.86

2. **Solution Subscription License and Support Cost Breakdown -** A detailed breakdown of the Year 1 Subcontractor and Capsule License costs are provided showing the licenses purchased from Contractor. Managed Services for maintenance and support prices are shown for the first year. The prices shown are year one costs and the amount of the increase Year-over-Year is provided with the assumptions in this proposal.

Software Product Name and Proposed Version	License Type	Description	Quantity	Cost
Subcontractor subscription costs for Year 1				
Customer Community for Public Sector- Logins UE – Per Month	Per Login by Month	Web Portal User	200000	$202,000.00
Digital Engagement - Unlimited Edition	Enterprise	Omni-channel for text	30	$8613.86
Digital Engagement - Additional Conversations (100)	Enterprise	Omni-channel for text	1	$345.60
Digital Engagement - Additional Triggered & Bulk Messages (1000)	Enterprise	Omni-channel for text	1000	$12,600.00

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Einstein Bots	Enterprise	Self-service for constituents	2000	$258517.20
Service Cloud Einstein - Unlimited Editions	Enterprise	Self-service for constituents	100	$32,308.00
Sales Enablement - Unlimited Edition	Enterprise	County staff	300	$40,830.00
Lightning Scheduler - Unlimited Edition	Enterprise	Solution Users	100	$28,713.00
Survey Response Pack (1000)	Enterprise	Outbound constituent feedback surveys	500	$7,935.00
Salesforce Shield	Enterprise	All CRM users	1	$176,607.00
Signature Success Subscription	Enterprise	Salesforce Support	1	$211,640.25
Public Sector Foundation – Advanced Unlimited Edition Tier 1	Per User	311 contact center users	250	$443,100.00
Public Sector Foundations MI Tier 2	Per User	Department, Admin, KM Admin, and Super Users	1050	$738,150.00
Tableau CRM for Public Sector Solutions UE	Per User	Analytics Users	5	$6,646.50
Heroku – 1 Dyno Unit	Enterprise	File Upload Transfer Utility	5	$2,646.00
Mulesoft subscription costs for Year 1				
Anypoint Platform – Titanium Edition	Enterprise	Integration Platform	1	$7,369.52
API Manager & Analytics– Titanium Edition	Enterprise	Integration Platform	1	$116,312.89
Load Balancer – Titanium Edition	Enterprise	Integration Platform	2	$1,615.24
Additional Production Core – Titanium Edition	Enterprise	Integration Platform	6	$94,491.42
Additional Pre-Production Core – Titanium Edition	Enterprise	Integration Platform	8	$211,712.88
Slack Enterprise Select	Enterprise	Communication Tool	1050	$0.00
Salesforce Year 1 Discount				($967,742.78)
Salesforce Total Year 1				$1,634,411.63
Part 2, Incapsulate Capsule subscription costs for Year 1				
Capsule - All County Departments	Site License	All County users, self-service mobile and web portal	1	$250,000.00
3rd Party License Passthrough Mark-up	Site License	N/A	1	$32,694.22
			Total Licensed Software	$1,917,099.86

Note: The Signature Success ("Signature Success") subscription purchased under this Agreement shall be provisioned to the following Org ID(s) only: 1 Org ID to be provisioned upon Subcontractor's processing of this fully executed Agreement bearing quote number Q-06194455. "Org" is defined as a unique instance of the applicable Services, i.e., a separate set of County Data and County-specific Service customizations held by Subcontractor in a logically separated database (i.e., a database segregated through password-controlled access). "Org" may also refer to "Tenant" or "Realm". Signature Success is a support offering that is custom priced per Org. The Signature Success subscription(s) ordered hereunder may not be transferred or provisioned to another Org. Signature Success fees will not be reduced or refunded for any reason, including a reduction in total net applicable subscriptions during the Order Term. County agrees to pay an incremental Signature Success fee equal to 10% of the total net applicable subscription fees for any new or additional subscriptions provisioned to the Org.

3. **Subscription Prices –** The table below provides the annual fees for Subscription Services, to be billed in accordance with Article

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7.6.

In accordance with Article 17 (Purchase of Additional Products), should the County add any additional products upon renewal, there will be a price increase for the added products, and pricing will be in accordance with the Contractor or Subcontractor's pricing in effect at the time of renewal or as otherwise agreed to by the parties and executed in accordance with Article 4.1. Additionally, any increase in subscription pricing resulting from the purchase of additional products will not exceed 0% over the then-current subscription pricing, provided that for each Subscription Term, the County renews its entire then-current subscription volume under this Agreement combined with any associated purchases of additional products, and each Subscription Term is one year in length.

Initial Term:

Subscription Fees	
Description	**Annual Fee**
Subscription Fees – Year 2	$3,004,197.50
Subscription Fees – Year 3	$2,954,197.50
Subscription Fees – Year 4	$2,966,519.01
Subscription Fees – Year 5	$ 2,979,271.77
Total for Subscription Fees	$11,905,185.79

Option to Renew Term:

Subscription Fees	
Description	**Annual Fee**
Subscription Fee - *Year 6*	$2,992,470.88
Subscription Fee - *Year 7*	$3,006,131.96
Subscription Fee - *Year 8*	$3,020,271.17
Subscription Fee -*Year 9*	$3,034,905.26
Subscription Fee - *Year 10*	$3,050,051.53
Total OTR for Subscription Fees	$15,103,830.79

4. Optional Products and Services

311 Capsule Mobile Worker App Growth - The County can also purchase additional Mobile Worker app licenses above the 25 included in the packaged 311 Capsule site subscription based on the table below.

Each row of the table below is a per-year subscription cost to add Mobile Worker App user's licenses across the County in the future.

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Contractor Product	Number of Users/Departments	Yearly Cost*
Contractor Mobile Worker App Subscription	1-25 Users	included
	25-50 Users	$20,000.00
	51-100 Users	$30,000.00
	101-200 Users	$45,000.00
	201-500 Users	$75,000.00
	501 Users and above	Upon Request

Note: The prices shown are year one costs, and the amount of the increase Year-over-Year is provided with the assumptions in this Agreement.

Optional Salesforce Expertise Hours:

Subcontractor Optional Services	Description	Hourly Rate
Salesforce Expertise Hours (Available during the 5 year term)	Services as described in Appendix B (160 Hour Minimum)	Not to exceed $453.00

Optional Contact Center Connection:

Contractor Product	Description	Year 1 Cost
Bucher + Suter Inc.	B+S-Connects for SF CTI Cisco licenses 100 agents, includes 1 Year of 24x7 Support	$28,903.00
	B+S-Connects for SF Professional Services - Not to Exceed*	$11,182.80
	Contractor Service Markup	$801.72

* Any Professional Services quoted (if applicable) are for project work, installation, and configuration related only to the Bucher + Suter software solutions specified in the table above. All professional services quoted are fixed price. Contractor will provide a detailed statement of work if requested. In the event that the County, in its sole discretion, opts to move forward with the purchase of Contact Center Connection in accordance with the process outlined in Article 17 and based upon the not to exceed pricing established above, the parties shall enter into good faith negotiations to establish the terms and conditions, scope, and pricing for such purchase, which shall be mutually agreed upon and executed in writing as a supplemental agreement to this Contract.

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ATTACHMENT D1 – ACCEPTANCE FORM

This document ("Milestone Acceptance Form") confirms that Contractor has completed the task(s) identified in the table below to an acceptable quality level as determined by the agreement between the County and the Contractor.

Milestone Number and Description	Date Completed

By signing this document, I acknowledge that the stated tasks were completed on the stated date and any deliverable(s) are of agreed quality levels per Contract No. RFP-01690. County Acceptance is **not** assumed if the document remains unsigned by the County after Contractor's signature.

Acceptance Granted:

	Contractor	Miami-Dade County
Printed Name		
Signature		
Job Title		
Date		

Conditional Acceptance Granted:
(To be completed in the event of Conditional Acceptance of any Deliverable(s) associated with this Milestone)

Description of Conditional Acceptance (to be completed by the County): (Include a description of what must be submitted in order to achieve partial payment and pending actions to be taken to complete the Deliverable(s) to achieve Acceptance)

Partial Payment Amount:

	Contractor	Miami-Dade County
Printed Name		
Signature		
Job Title		
Date		

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EXHIBIT A - FUNCTIONAL SPECIFICATIONS MATRIX

The Solution shall provide the functionalities outlined in the matrix below. The following response codes are utilized to clarify the level of effort required to meet the requirement:

0 -	**No** Functionality does not presently exist in the Solution and will not be developed.
1 -	**Complete Development** Functionality does not presently exist in the Solution and will require full development by the Contractor.
2-	**Significant Development** Functionality minimally exists in the Solution but will require considerable development by the Contractor.
3 -	**Minimal Development** Functionality is presently available in the Solution and can be established with minimal development, if any. Any subject matter expertise and Services required in order to deliver the functionality are required to be performed by the Contractor
4-	**Out of the Box with Configuration** Functionality is available in the Solution out of the box and only requires configuration by the Contractor.

Functionality which includes a "0" response code or appear in strikethrough font shall be considered to be outside of the scope of this Contract, unless otherwise mutually agreed by the parties in writing, executed by authorized individuals. Functionality which includes a "1", "2" or "3" which required development in order to be delivered must be completed, undergo UAT, and Accepted by the County in accordance with the Acceptance Policy outlined below prior to Final Acceptance in accordance with the provisions of Appendix A (Scope of Work).

Acceptance Policy: The County is willing to make reasonable business process changes rather than expecting the Solution to conform to every aspect of current system/processes in order to provide functionality. Contractor acknowledges and agrees that the County shall not be considered unreasonable for withholding or failing to grant Acceptance of any functionality due to the following items:

- Functionality fails to conform to any legislative mandates or applicable law
- Manner in which functionality is delivered creates undue impact to operations (i.e. a significant increase in the number of steps required to complete a task)

Manner in which functionality is delivered results in a loss of functionality currently available in the legacy system which supports a business operation

#	SOFTWARE FEATURE DESCRIPTION	Response (0-4)	Explanation
1.0	**SERVICE REQUEST (SR) INTAKE**		
1.1	Ability for agent to select the SR configuration from a drop-down list or auto fill.	4	
1.2	Ability to customize agent intake screen – i.e., creation of new tabs, alter intake order, make certain intake fields more prominent or remove certain intake fields.	4	Agent can have multiple tabs open in salesforce and console. The SR questions can be modified based on the requirement in configuration
1.3	Application should provide an agent console which combines a list view, a detail view, and a mini view with related information into one screen	4	
1.4	Ability to assign unique tracking number for each SR, beginning with the year created.	4	
1.5	Ability to automatically record the agent who opened the SR, based on user ID.	4	
1.6	Ability to track by a SR field the channel in which the SR was received (Method Received).	4	
1.7	Ability to display complete interaction history when the agent enters an address and/or customer name.	4	
1.8	Ability to designate a status field that includes, but is not limited to, open, pending, in progress, void or closed.	4	
1.9	Complete an SR form using single answer or multiple answers from list, free-form field, calendar field and alpha/numeric field.	4	
1.10	Ability to support branching based on responses to questions in the script.	4	
1.11	Ability to modify, delete and archive scripts.	4	Each SR type uses versioning to track variations of configuration values over time
1.12	Ability to provide calendar pop-up functions for all date-related fields.	4	
1.13	Ability to provide limited and unlimited open text fields.	4	

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1.14	Ability to define fields as mandatory by SR configuration before SR saved.	4	
1.15	Allow user to include open comments on all SR configurations.	4	
1.16	Ability for permission granted user to close SRs when completed.	4	
1.17	Ability to automatically spellcheck.	4	Dependent on browser provided functionality
1.18	Allow for autocompletion feature including wildcard.	4	Certain relevant fields in the SR intake can be prepopulated and Salesforce search supports wildcard option. This is available for console users/MDC agents/CSRs
1.19	Ability to automatically assign a date and time stamp for each update made to an SR.	4	Case history and audit fields can be used for this.
1.20	Ability to open SR anonymously.	4	The requirement to capture contact info or allow anonymous contacts is configurable by SR type
1.21	Ability to enter multiple SR configurations from a single customer during a contact without reentering profile data.	4	The capsule allows for quick create buttons to clone and create a new service request using existing contact/profile information
1.22	Ability to detect a duplicate SR for the same address and same issue.	4	
1.23	Ability to allow for configuration that determines how duplicate SRs are treated.	4	
1.24	Ability to update an SR with additional comments.	4	
1.25	Ability for status field to be automatically updated when certain workflow activity items are completed.	4	We will use workflow rules, process builders to meet this requirement. If during discovery the requirements warrants a code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.
1.26	Ability to load/link photos and documentation (such as PDF) to the SR.	4	
1.27	Ability for a field to allow distinction between initial or follow-up inquiry.	4	Service activities configured on the individual SR Types will be used for this.

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1.28	Ability to view history of all activities and interactions associated to an SR.	4	The Salesforce solution for customer service enables you to select information on cases and solutions that need a detailed audit trail. Standard and custom fields can easily be audited by enabling history tracking for those fields. The historical information is tracked as part of the case or solution history. The extended history data is available for reporting, which allows easy construction of audit trail reports. • Track Anything: Track information relevant to managing support processes effectively, such as who changed the information, when it was changed, and the before and after values. • Easy Setup: Set up history tracking as part of the definition of fields for cases and solutions. • Multi Language Support: Knowledge base content can be authored and maintained in the same 15 languages supported throughout the Salesforce family of CRM applications. • Ability to track work times for multiple locations: You can establish multiple business hours across a single organization. As a result, you can more effectively monitor service delivery that spans the globe or different time zones. With Global Business Hours, you get greater visibility into and better reporting on the success of your service delivery. • Archival of Field History Data for Auditing and Retention: Field Audit Trail lets you define a policy to retain archived field history data up to ten years, independent of field history tracking. This feature helps you comply with industry regulations related to audit capability and data retention.
1.29	Ability to view the service level agreements for each SR configuration.	4	
1.30	Ability to have today's date serve as automatic default with the ability to override.	4	Audit fields on the record cannot be edited without special permissions for the user and only at the time of creation. Custom fields can be created if needed to capture dates.
1.31	Ability to automatically record user making any addition to an SR based on user ID.	4	**System audit fields can be used for this. Salesforce field history tracking limits apply**
1.32	Ability to view SR activity notes within an SR in reverse chronological order and includes author identification.	4	
1.33	Ability to configure autosave feature for any SR configuration.	4	**Autosave is not available in salesforce and Incapsulate 311.**
1.34	Ability to auto populate data into a comments field.	4	Canned outcome responses can be configured to populate the comments fields. In addition, we will use workflow rules, process builders to meet this requirement, if needed. If during discovery the requirements warrant a code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.

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1.35	Ability to view history of all activities and interactions associated to an SR.	4	
#		Response (0-4)	Explanation
2.0	SERVICE REQUEST (SR) MANAGEMENT		
2.1	Ability for entry of all SRs into a centralized database with integrated intake, routing, resolution and reporting modules	4	
2.2	Ability to send forms/articles/documents to the constituent.	4	OOTB salesforce functionality can be used: https://help.salesforce.com/s/articleView?id=000321927&type=1
2.3	Ability to complete a mass SR creation or copy capabilities	4	Clone option on Service Requests can be leveraged for mass creation of SRs
2.4	Ability to interact with existing survey tools (Qualtrics) and provide an automatic survey tool at multiple points in the life of the SR.	3	**Quatrics provides connector with salesforce. We are going to use the connector as-is. Any change on Qualtrics side would be added scope.https://www.qualtrics.com/support/integrations/salesforce-integration/salesforce-integration-overview/**
2.5	Ability to enable notifications (pop-ups) on SRs.	4	Different types of validations based on answers to intake questions, GIS based validations, field level validations can be setup. This is all managed through configuration. If during discovery the requirements warrant a code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.
2.6	Provides easy to follow template for creating SRs.	4	
2.7	Provides ability to configure customizable confirmation messages (all channels).	4	
2.8	Ability to create icons for shortcuts to specific or popular features of the CRM Solution.	4	
2.9	Ability to automatically assign work by: SR Configuration, Priority Level or answer field selection within the SR.	4	We propose to use workflow rules, process builders to meet this requirement, if needed. If during discovery the requirements warrant a code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.
2.10	Ability to enable alerts, pop-ups or call-handling prompts based on selection of SR Configuration or based on selection of particular answer option.	4	Different types of validations based on answers to intake questions, GIS based validations, field level validations can be setup. This is all managed through configuration and any workflows/process builders as needed

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2.11	Ability for user to be required to confirm selection of a delete function.	4	
2.12	Ability to search existing SRs by various field types to include, but not limited to: SR configuration, created date, agent, answer to any SR question, SR address/street intersection/landmark, customer profile information and assigned department	4	OOTB Salesforce Search feature
2.13	Ability to search existing SRs by GIS buffer/radius, search by address, intersection, and mouse click on map with ability to enter the distance to search in various units of measure.	4	Heat map and OOTB Salesforce Search features
2.14	Ability to exclusively use MDC provided address locators for the geocoding of addresses, intersections, and landmarks	4	Integration with County's GIS. Need the County GIS to 1. Make available (publicly accessible or authenticated) ESRI GIS services (ArcGIS version 10.x or higher) 2. Provide the composite layer and locator endpoints.
2.15	Ability to put custom quotas for individual SRs types, preventing the creation of additional SRs from being created for this SR once quota reached	4	Based on the requirement, we can configure quota for any SR type and provide the validation
2.16	Ability to search for SRs that are overdue when closed (define parameters).	4	Salesforce reports, list view, search filters
2.17	Ability to import/export standard desktop application files	4	Salesforce is a web and cloud based application. There are no different versions for desktop and web based access and the information is uniform across the versions
2.18	Ability to allow more than one user to view an SR at the same time.	4	
2.19	Ability to define service level agreements for each SR configuration.	4	
2.20	Ability to allow prioritization of requests.	4	
2.21	Restrict viewing and input capability via security permissions	4	OOTB Salesforce Profiles, Permissions, Roles, and Sharing rules to be used. Custom development has not been proposed
2.22	Ability to establish user-defined workflow options per SR configuration.	4	

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2.23	Ability to allow users access to approval/rejection of workflow approval requests on any mobile device.	4	Service activity and outcomes can be used to capture approval & rejection flows
2.24	Ability to establish work queues for each department or department division for routing of requests.	4	
2.25	Ability to manage different permissions for access to data and SR configuration based on user profile.	4	
2.26	Ability to configure CRM Solution view based on user profile.	4	
2.27	Ability to enable predetermined scripted questions for each SR configuration.	4	
2.28	Ability to enable alerts, pop-ups or call-handling prompts based on selection of SR Configuration or based on selection of particular answer option.	4	This is duplicate of 2.10. Different types of validations based on answers to intake questions, GIS based validations, field level validations can be setup. This is all managed through configuration and any workflows/process builders as needed
2.29	Ability to create parent-child relationships so multiple SRs may be linked to a master SR.	4	
2.30	Ability to link more than one master SR to another master SR.	4	**Parent SR/ linked SR can be used.**
2.31	Ability to set business hours and holidays in calculation of performance of service level agreements, noting that business hours may be different across SR configurations and departments.	4	
2.32	Ability to manage documents and photos by user role and classification to protect sensitive information.	4	
2.33	Ability for user with no IT expertise to configure SR configurations, prompts, notifications, and automated messages.	4	
2.34	Ability for administration rights within the application to be set at multiple levels.	4	
2.35	Ability to set default values based on user profile.	4	**OOTB Salesforce features and a combination of workflows and process builders will be used to address this requirement. If during discovery the requirements warrant a**

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			code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.
#		**Response (0-4)**	**Explanation**
3.0	**ROUTING/ESCALATION**		
3.1	Ability to assign SR to appropriate Department for resolution.	4	The Salesforce Omni-Channel routing capability is not limited to just Cases. It can also be employed for customer's Web Chats, SOS Video calls, Social Posts, Knowledge Articles, Orders, Leads or even Custom Objects. All of these along with Cases are called Work Items in Salesforce Omni-Channel and represent a broad range of ways customers might request timely service, support or response. Omni-Channel Work Item routing ensures that Customers get the most responsive experiences possible while optimizing agent productivity and prioritizing the volume of all Work items in a way that is optimal for both the Customer Experience and the Operations of all Support Agents.
3.2	Ability to automatically route SRs to a selected department or staff, notify the staff that a request is in queue and record actions taken and updates made by department in the SR.	4	
3.3	Ability to establish service level agreements for each activity of an SR.	4	
3.4	Ability to automatically assign staff based on geographic area or GIS layer.	4	Salesforce assignment rules will be leveraged to address this requirement. The criteria of assigning staff to a given SR will be calculated based on the information on the SR, GIS information and its related data.
3.5	Ability to automatically assign staff based on answers to flex questions.	4	Salesforce assignment rules will be leveraged to address this requirement. The criteria of assigning staff to a given SR will be calculated based on the information on the SR and its related data.
3.6	Ability to automatically assign a priority code based on transaction type with an override allowed (elected officials, time sensitive requests, safety concerns, etc.).	4	Can be done with the help of basic configuration of process builder and workflow rule.
3.7	Ability to escalate requests manually or automatically based on predefined escalation rules (overdue).	4	OOTB Salesforce escalation rules
3.8	Ability to create and update automatic that are time triggered and defined for each SR configuration.	4	

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3.9	Ability to provide alerts and notifications to appropriate staff.	4	
3.10	Ability to automatically escalate to appropriate staff for past due, emergency, urgent requests or large volume of requests.	4	Workflow rules, reports, and process builders will be leveraged to address this requirement. If during discovery the requirements warrant a code based solution, Incapsulate will work with the County to discuss alternative approaches or provide an LOE for implementation.
3.11	Ability to set business hours and holidays in calculation of performance of service level agreements, noting that business hours may be different across SR configurations and departments.	4	
3.12	Ability to identify and alert SRs that are nearing their due date or past their due date.	4	Salesforce reports and subscription to reports.
3.13	Ability to enter multiple outcomes for an SR.	4	Multiple activities and activity outcome questions, and outcomes can be used to address this.
#		**Response (0-4)**	**Explanation**
4.0	**MULTI-CHANNEL INTEGRATION**		

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4.1	Ability to accept SRs and track those requests in a single database from multiple channels, including phone, email, mail, in person, web, mobile applications, tablet, social media, text and 3rd party integrations.	4	The 311 Capsule will be used to accept and create SRs from all of these channels. Phone calls or in person interactions would be taken by 311 or MDC staff who would use the Capsule Agent Console to create new SRs. SRs from the 311 Capsule web portal or mobile application are auto created and routed to the appropriate queues for each SR type. All other types of Salesforce interactions and messages captured from various channels including chat, email, and social may be assigned manually or automatically via assignment rules to queues or to individual users. When cases are assigned to a queue, users who are members of that queue would have visibility and access to those cases, and can use the 311 Capsule Agent Console features to view the message, determine if there is enough information to create a service request if needed to act on and manage them accordingly. Omni-Channel is the Service Cloud's comprehensive customer service solution that pushes work to qualified agents in real time, right from the Salesforce console and it has been integrated into the 311 Capsule Agent console. Multi Tiered queuing and routing capabilities, including skills based routing, enable individuals or groups to review and act on inquiries and quickly resolve customer issues. For example, Salesforce Omni-Channel provides the framework for routing work to the appropriate agents. Work items are routed to queues based on attributes of the work item (channel, type, language, geography, etc). Agents are assigned to different Presence Statuses (skill sets) that determine access to those queues. Presence Status indicates whether an agent is online and available to receive incoming work items. An agent is assigned to one or more Presence Statuses via their profile or permission set. If these profiles or permission sets change, all agents assigned to them receive the updates automatically. Omni Channel Supervision In Lightning Experience, supervisors can see live information on agents and queues and drill down for agent, work, and queue details including skills based routing work queues. They can also view a timeline of agents' work. Supervisor's can respond to incoming support requests by changing queues as needed of agents or update agent skills quickly. Create supervisor configurations to determine which agents a supervisor or group of supervisors can see when they're using Omni-Channel Supervisor. Support supervisors can click *Monitor* in the Omni-Channel Supervisor Agents tab to open a chat window and see the conversation between the agent and the customer. The supervisor can also whisper to the agent to provide suggestions during the chat which only the agent can see. Supervisors can view up to five conversations at the same time.

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			Help supervisors can also stay on top of messages sent between agents and customers. Supervisors can see what an agent is typing before sending a message with the agent sneak peek feature. Customer sneak peek lets a supervisor see what customers are typing before they hit send. Route Work to Agents in Lightning Experience Support agents can use the Omni-Channel utility in the Lightning Service Console to change their presence status, accept and decline work requests and see their existing work requests. Work can be routed to agents based on their skills and their skill level enabling the right work to be routed to the right person. After a designated timeout period, a skill marked as additional is dropped from Omni-Channel routing. The case is then routed to the best-matched agent, even if the agent doesn't have all the skills. Create Service Request Teams A SR team is a group of people that work together to review inbound omni-channel messages and interactions, creating SRs for departments to respond to as required.
4.2	Ability to create a generic email address which automatically routes cases to representatives with the proper skill set (i.e. program questions versus technical issues). Customer responses should associate automatically to the original case, and support email attachments.	4	Email to case can be used. Salesforce assignment rules will be leveraged to address this requirement. The criteria of assigning staff to a given SR will be calculated based on the information on the SR and its related data.
4.3	Ability to automatically or manually create cases from social posts, such as Facebook and Twitter.	4	**This is Social Studio out of the box functionality. All the limitations of it will apply. Social Studio is scheduled to be retired Nov 18th, 2024, we will be working with the County to provide this functionality with the replacement <u>Sprout Social product from Salesforce when it becomes available</u>.**
4.4	Ability to route cases based on social influence.	4	
4.5	Ability to update an original existing case, not create a new case.	4	
4.6	Ability to allow agents to only respond to specific social accounts.	4	
4.7	Ability to transition to chat or email engagement with a social customer when a more private resolution channel is required.	4	

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4.8	Ability to mass close open social cases with no customer response.	4	
4.9	Ability to create contact log that identifies the frequency and number of interactions with constituents across the channels.	4	
4.10	Ability for users to view, track and retrieve documents and photos submitted via any channel.	4	
4.11	Ability to provide automated web chat responses with a service or chat bot	4	**Incapsulate provides ability to incorporate liveagent and chatbot, The script and configuration of chatbot requires customization**
4.12	Ability to classify the intent of customer inquiries to automatically route and escalate service cases through the use of artificial intelligence	4	**Social Studio out of the box functionality. All the limtation of it will apply.**
#		**Response (0-4)**	**Explanation**
5.0	**CUSTOMER INTERACTIONS**		
5.1	Ability to create a record of information-only contacts.	4	Record types on the contact object will be used to address this requirement. In case if capturing information only customer queries, SR types can be leveraged.
5.2	Ability to develop, customize, and report on information categories for different contact types.	4	
5.3	Ability to automatically record agent, date and time on information-only contacts.	4	
5.4	Ability to provide a unique identifier for each customer so that all requests and contacts through the multiple channels from a constituent may be linked.	4	
5.5	Administrative tool is provided for name correction, duplicate checking and merging of contacts.	4	**Deduplicate rules: Out of the box functionality**
5.6	Ability to redact customer information for reporting, printing or SR history if customer chooses to remain anonymous.	4	
5.7	Ability to automatically send a responding Email when cases are captured from other Email, or from a web site.	4	**Auto response email on case creation**

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5.8	Ability to capture multiple address types, phone numbers, email addresses, social media contact information per customer.	4	Based on the rdiscovery session, we will work to ceate extra fields/object to capture this information on contact object.
5.9	Ability for constituent to select a preferred communications channel.	4	
#		**Response (0-4)**	**Explanation**
6.0	**CRM Solution ADMINISTRATION**		
6.1	Ability to change look and feel of application page layout based on the type of record the user is viewing for better segmentation of data, reporting, and ease of use.	4	OOTB Salesforce page layouts, and view will be leveraged to customize the view. Custom or Visualforce page development has not been included in the scope of the SOW. Page layout per record type
6.2	Ability for Administrators delegate administrative rights to a local admin for a portion of the application (i.e., a municipality, department, or agency).	4	Can create permission set, profiles and assign it to other person. System has ability to do it. Configuration of profiles for this requirement is out of the scope
6.3	Ability to define roles, access and permissions of users, including agency hierarchy.	4	
6.4	Ability to associate a single contact to multiple accounts	4	Salesforce system provides this ability but we have not encountered this use case for a 311 system implementation as every contact is captured as citizen and associated with one acocunt. If during discovery sessions, a use case warrants storing the contact information other than citizens, we can certainly enable that feature. Here is the link: https://help.salesforce.com/s/articleView?id=sf.shared_contacts_set_up.htm&type=5
6.5	Ability to setup audit trail so that changes to Cases, Accounts, or any user created records are visible.	4	
6.6	Ability to change the fiscal year without having to call vendor.	4	
6.7	Ability to prevent unauthorized users to view specific fields beyond what is available in page layouts. Ensure there are no security leaks and that sensitive data is not available in reports and API calls.	4	OOTB Salesforce profiles and permissions
6.8	Ability to assign page layouts to types of records and not just a role.	4	OOTB Salesforce feature

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6.9	Ability to report on queries input by customers and which associated articles were accessed resulting from those queries. Reports provide management feedback on effectiveness of Knowledge Base content for solving customer problems.	4	Salesforce provide OOTB knowledge base reports. here is the link: https://help.salesforce.com/s/articleView?id=sf.knowledge_custom_reports.htm&type=5 . The system also provide ability to create custom report as needed. Incapsulate will provide training for the same.
6.10	Ability to monitor frequency of use by agent; usage by module; usage by role; usage by browser; and CRM Solution response time.	4	Differernt Salesforce OOTB reports can be used and build. The system has ability to build custom reports hence Incapsulate will train the trainer about this ability.

#		Response (0-4)	Explanation
7.0	**CONTENT MANAGEMENT/KNOWLEDGE BASE**		
7.1	Ability to integrate with miamidade.gov public facing website.	4	To make your customer's experience as familiar as possible, your customer digital experience must match the look and feel of the County web site and be very easy to use. Salesforce Service Cloud offers tools to help the County efficiently configure a customer digital experience without any design or programming or IT help. • Site Templates for Self-Service: Site Templates for Self-Service lets you build, brand, and deploy self-service customer support digital experiences that look great on any device. • Cases: Digital Experience users have the option to view the lifecycle of a case from start to finish: all case interactions appear in a unified, chronological Chatter case feed. User efficiency is enhanced by utilizing quick actions for cases. With mass actions your customers can select up to 100 records in a list view and perform mass updates rather than updating records one at a time. Digital Experience users benefit from the added functionalities of Chatter, while features on the support side make it easier for agents to provide more efficient, personalized support. In digital experiences and the Service Console, agents can control whether a feed item is private or public. Public feed items are visible to both internal and external users. Private feed items are visible only to internal users. • Digital Experience Poll: Use the Poll tab in the Chatter publisher to add a poll to a record, group, or profile feed. Easily find all related posts under one topic whenever you want by using hashtags when you publish polls. Digital Experience admins and moderators can close posts, polls, and questions without any special configuration. • Chatter Questions: With Chatter Questions, you can promote collaboration among users and service agents by giving users the ability to ask and contribute to questions in Chatter. When users are logged in to a digital experience, they're also able to ask questions and participate in

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			threaded discussions. Members in the digital experience can answer questions in Chatter just like commenting on a post in Chatter. The person who asked the question or the question's moderator can select a best answer—which is prominently displayed in the feed—allowing other users to quickly and easily find the best response to their question. View counts allow users to easily gauge how interested people are in a post or how well-placed it is. The count tally increases any time a post is commented on, liked, or the post's detail page is viewed. When members view questions, we also show related questions to help them find what they're looking for. Users can also filter questions by All Questions, Unanswered Questions, Questions with No Best Answer, and Questions with Best Answer. Hyperlinks to your posts and comments can be used anywhere you see fit throughout the digital experience. • Searching for Information: Global search in digital experience allows both guest users and logged-in users to search for and access articles, search and view discussions, search data or records they have access to, and contact agents through official support channels. As members enter search terms, the search publisher has the option of showing suggested results in one list or tabbed lists for Articles, Discussions, Cases or the other record types the user has access to. Digital experience users can further filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks. • Point-and-Click Style Editor: Easily configure your organization's self-service portal to match your corporate branding with clicks not code. You can use the style editor to adjust multiple portal themes including the fonts and colors of text, background, headers, and footers — all using a visual, point-and-click interface. Advanced users can opt to modify the style, font-family scripts directly through the same interface. • Suggested Articles and Related Articles: Leverage suggested knowledge articles to help your customers self-close cases by providing the most relevant solution match to their inquiries. While a user is submitting a new case, we enable deflection and self-resolution by providing an in-context list of suggest articles based on the content of the inquiry. When members view articles, we show related articles to help them find what they're looking for. Members can see the number of times articles have been viewed to discover the most helpful articles. Use the Deflection Tracking component in Experience Builder to ask users about the effectiveness of your content. You can present them with a customized set of answers, and capture their feedback in your Salesforce org. • Guided Support: Create guided questions and steps to help your customers initiate a process, service request, or view a suggested knowledge article.

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			• Knowledge Management: Publish your solutions and knowledge base so your customers can search for answers quickly and easily. You can make collaboration feeds available on your knowledge articles, allowing members to provide feedback that digital experience managers can use to curate and update the knowledge base. The Case Deflection component suggests articles in a very intuitive way. When a user creates a case, suggested articles appear after the user types three or more characters in either the Subject or Description field. If the user switches to another field, suggested articles continue to display until the user's typed at least three characters in the second field. If the user stops typing, the suggested articles remain. • Highlight featured documents to assist your customers; Get direct feedback on your content: Give customers the collateral and information they need to resolve their issues immediately. Because your customers can also provide immediate feedback on the content, you can make changes quickly, while focusing on content quality and usefulness. • Custom Recommendations: Create and manage customer recommendations to drive engagement for your digital experience, encouraging users to watch videos, take trainings, and more. (Note: This is only available in Experience Cloud using the Customer Service template or using Salesforce - see https://help.salesforce.com/HTViewHelpDoc?id=networks_recs.htm for details) • Customer Reports: Your customers can set up and view Salesforce reports directly from the Salesforce Customer Digital Experience. These capabilities extend the digital experience's self-service capabilities by giving customers access to critical operational data. By providing reporting capabilities from the Salesforce Customer Digital Experience, you gain an additional tool for showing progress and broadcasting success to your customers. • Groups to Drive Collaboration: Want more collaborative digital experiences? Allow members and guest users to browse and join groups in your Customer Service Digital Experience. Use the out-of-the-box design for groups in Customer Service, or create your own customized version of the group detail page using separate components. You can also create broadcast groups which allow group owners and managers to post information, but restrict group members from commenting. Additionally, the Email on Announcement feature allows group managers to send out email announcements to all members at once, regardless of their email settings, to ensure people don't miss important information. Members can choose groups to visit or join using a grid view, or via a graphical tile view. • User Profiles: Users can update their own profiles within the digital experience to change their photo or update their name, address and other attributes. You can enable Digital Experience

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			User Visibility to let members view members of other digital experiences. You can also turn the option off to keep your members hidden. • Files in Digital Experiences: Users can attach multiple files (up to 10) to a single feed post, upload and select files in a unified flow, and preview files in the Lightning multi-file preview player. You can also add additional files or remove existing files when editing a post. If you want to add an image to your post but don't want to attach it as a separate file, you can insert inline images within the flow of text using the rich text editor. Members who have access to files in content libraries can also navigate to those files via the Files List component on digital experience pages, allowing members to view and interact with all their files in one place. Finally, developers looking to share code snippets are not limited to attaching files. Code Snippets let developers add code samples with syntax highlighting in the publisher's rich text editor and appear in the post. You can also un-share files in digital experiences. • You can access external files in your digital experience using Files Connect. Access files from Quip, Google Drive, SharePoint, Box, and OneDrive for Business • Library managers can create, rename, and delete folders in libraries, and move files between folders in a library. • Manage Library Membership: Update, add, delete, and track library members all from one place. You can even tell who's an internal or external user. As a library admin, you can create and manage library memberships from Files Home and users can see changes in their digital experience. • Partners can share digital experience files with customers, leads, and colleagues using content deliveries and public links. Both tools create encrypted URLs to share web-based versions of files. Content deliveries provide additional security and tracking features. • Share multiple files easily by creating public links to folders. • When you visit a digital experience feed on a mobile device, you can use any Rich Publisher Apps that are available in the feed publisher. • Member Engagement Queue: Find members and easily communicate with them. You can sort your members, check out who's posting and what their reputation score is, see who has a profile photo, create filters, view member details, and more! After you've narrowed down your search to a certain list of users, post directly to members' profiles or send a direct message. • Question to Case: Users may ask questions via Chatter, and if appropriate agents may convert that question to a Case to formalize answering of the question and lead to higher customer satisfaction. For details see: https://help.salesforce.com/articleView?id=sf.questions_qtc_set_up_qtc.htm&type=5.

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			• HTML Messages: The Customer Digital Experience includes the ability to configure custom-language HTML messages that display to portal users based on their language settings. • Passwordless Login: Log In with Identity Verification Methods Instead of Passwords. Members, customers, and other external users can have the convenience of logging into your digital experience with a verification code instead of a password. For example, have your external users log in with a code that you send in an email or text message. • Single Sign On: Single sign-on is a process that allows network users to access all authorized network resources without having to log in separately to each resource. Single sign-on allows you to validate usernames and passwords against your corporate user database or other client application rather than having separate user passwords managed by Salesforce. You can set up Customer Digital Experiences and Partner Digital Experiences to use single sign-on, so that a customer only has to login once. • Lightning Global Notifications: Get informed immediately when you are @mentioned in Salesforce with real time global notifications, including any digital experience and any device, whether it's a desktop, mobile web, or the Salesforce Mobile App. With just one click, you're taken to where you were @mentioned, so browsing back and forth between the internal org and between the digital experience is seamless.

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			To make your customer's experience as familiar as possible, your customer digital experience must match the look and feel of the County web site and be very easy to use. Salesforce Service Cloud offers tools to help the County efficiently configure a customer digital experience without any design or programming or IT help. • Site Templates for Self-Service: Site Templates for Self-Service lets you build, brand, and deploy self-service customer support digital experiences that look great on any device.

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			• Searching for Information: Global search in digital experience allows both guest users and logged-in users to search for and access articles, search and view discussions, search data or records they have access to, and contact agents through official support channels. As members enter search terms, the search publisher has the option of showing suggested results in one list or tabbed lists for Articles, Discussions, Cases or the other record types the user has access to. Digital experience users can further filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks. • Point-and-Click Style Editor: Easily configure your organization's self-service portal to match your corporate branding with clicks not code. You can use the style editor to adjust multiple portal themes including the fonts and colors of text, background, headers, and footers — all using a visual, point-and-click interface. Advanced users can opt to modify the style, font-family scripts directly through the same interface. • Suggested Articles and Related Articles: Leverage suggested knowledge articles to help your customers self-close cases by providing the most relevant solution match to their inquiries. While a user is submitting a new case, we enable deflection and self-resolution by providing an in-context list of suggest articles based on the content of the inquiry. When members view articles, we show related articles to help them find what they're looking for. Members can see the number of times articles have been viewed to discover the most helpful articles. Use the Deflection Tracking component in Experience Builder to ask users about the effectiveness of your content. You can present them with a customized set of answers, and capture their feedback in your Salesforce org. • Guided Support: Create guided questions and steps to help your customers initiate a process, service request, or view a suggested knowledge article. • Knowledge Management: Publish your solutions and knowledge base so your customers can search for answers quickly and easily. You can make collaboration feeds available on your knowledge articles, allowing members to provide feedback that digital experience managers can use to curate and update the knowledge base. The Case Deflection component suggests articles in a very intuitive way. When a user creates a case, suggested articles appear after the user types three or more characters in either the Subject or Description field. If the user switches to another field, suggested articles continue to display until the user's typed at least three characters in the second field. If the user stops typing, the suggested articles remain. • Highlight featured documents to assist your customers; Get direct feedback on your content: Give customers the collateral and information they need to resolve their issues immediately.

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			Because your customers can also provide immediate feedback on the content, you can make changes quickly, while focusing on content quality and usefulness. • Custom Recommendations: Create and manage customer recommendations to drive engagement for your digital experience, encouraging users to watch videos, take trainings, and more. (Note: This is only available in Experience Cloud using the Customer Service template or using Salesforce - see https://help.salesforce.com/HTViewHelpDoc?id=networks_recs.htm for details) • Customer Reports: Your customers can set up and view Salesforce reports directly from the Salesforce Customer Digital Experience. These capabilities extend the digital experience's self-service capabilities by giving customers access to critical operational data. By providing reporting capabilities from the Salesforce Customer Digital Experience, you gain an additional tool for showing progress and broadcasting success to your customers. • Groups to Drive Collaboration: Want more collaborative digital experiences? Allow members and guest users to browse and join groups in your Customer Service Digital Experience. Use the out-of-the-box design for groups in Customer Service, or create your own customized version of the group detail page using separate components. You can also create broadcast groups which allow group owners and managers to post information, but restrict group members from commenting. Additionally, the Email on Announcement feature allows group managers to send out email announcements to all members at once, regardless of their email settings, to ensure people don't miss important information. Members can choose groups to visit or join using a grid view, or via a graphical tile view. • User Profiles: Users can update their own profiles within the digital experience to change their photo or update their name, address and other attributes. You can enable Digital Experience User Visibility to let members view members of other digital experiences. You can also turn the option off to keep your members hidden. • Files in Digital Experiences: Users can attach multiple files (up to 10) to a single feed post, upload and select files in a unified flow, and preview files in the Lightning multi-file preview player. You can also add additional files or remove existing files when editing a post. If you want to add an image to your post but don't want to attach it as a separate file, you can insert inline images within the flow of text using the rich text editor. Members who have access to files in content libraries can also navigate to those files via the Files List component on digital experience pages, allowing members to view and interact with all their files in one place. Finally, developers looking to share code snippets are not limited to attaching files. Code Snippets let

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			developers add code samples with syntax highlighting in the publisher's rich text editor and appear in the post. You can also un-share files in digital experiences. • You can access external files in your digital experience using Files Connect. Access files from Quip, Google Drive, SharePoint, Box, and OneDrive for Business • Library managers can create, rename, and delete folders in libraries, and move files between folders in a library. • Manage Library Membership: Update, add, delete, and track library members all from one place. You can even tell who's an internal or external user. As a library admin, you can create and manage library memberships from Files Home and users can see changes in their digital experience. • Partners can share digital experience files with customers, leads, and colleagues using content deliveries and public links. Both tools create encrypted URLs to share web-based versions of files. Content deliveries provide additional security and tracking features. • Share multiple files easily by creating public links to folders. • When you visit a digital experience feed on a mobile device, you can use any Rich Publisher Apps that are available in the feed publisher. • Member Engagement Queue: Find members and easily communicate with them. You can sort your members, check out who's posting and what their reputation score is, see who has a profile photo, create filters, view member details, and more! After you've narrowed down your search to a certain list of users, post directly to members' profiles or send a direct message. • Question to Case: Users may ask questions via Chatter, and if appropriate agents may convert that question to a Case to formalize answering of the question and lead to higher customer satisfaction. For details see: https://help.salesforce.com/articleView?id=sf.questions_qtc_set_up_qtc.htm&type=5. • HTML Messages: The Customer Digital Experience includes the ability to configure custom-language HTML messages that display to portal users based on their language settings. • Passwordless Login: Log In with Identity Verification Methods Instead of Passwords. Members, customers, and other external users can have the convenience of logging into your digital experience with a verification code instead of a password. For example, have your external users log in with a code that you send in an email or text message.

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			• Single Sign On: Single sign-on is a process that allows network users to access all authorized network resources without having to log in separately to each resource. Single sign-on allows you to validate usernames and passwords against your corporate user database or other client application rather than having separate user passwords managed by Salesforce. You can set up Customer Digital Experiences and Partner Digital Experiences to use single sign-on, so that a customer only has to login once. • Lightning Global Notifications: Get informed immediately when you are @mentioned in Salesforce with real time global notifications, including any digital experience and any device, whether it's a desktop, mobile web, or the Salesforce Mobile App. With just one click, you're taken to where you were @mentioned, so browsing back and forth between the internal org and between the digital experience is seamless.
7.2	Ability to integrate with miamidade.gov Content Management CRM Solution (OpenText TeamSite)	3	**We are going to use the plug in provide by Opentext: https://www.opentext.com/products-and-solutions/products/opentext-apps-for-salesforce. Limitation of this plugin will apply**
7.3	Ability to secure content for specified audience (internal versus external customers).	4	
7.4	Ability to search knowledge base information using keywords, phrases and synonyms.	4	Relies on OOTB Salesforce Knowledge Feature. No custom development. Applicable to all requirements around Knowledge articles
7.5	Ability to search knowledge bases information using wildcard searches.	4	
7.6	Ability to initiate an inquiry record from within a knowledge base topic to record the topic of the call.	4	Deeplink SR Creation from Knowledge Article
7.7	Ability to create call scripts to link to knowledge base topics and frequently asked questions (FAQs).	4	
7.8	Ability to send forms, topics, and documents to a customer.	4	
7.9	Ability to include weblinks in topics.	4	
7.10	Ability to link to documents external to the CRM application.	4	
7.11	Ability to view documents in their native format without having the original application loaded on the user's computer.	4	

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7.12	Ability to have public-facing and internal-facing views of Frequently Asked Questions (FAQs) and knowledge base views.	4	
7.13	Ability to meet Americans with Disabilities Act (ADA) requirements.	4	
7.14	Ability to restrict view of phone directories based on public/internal views, department and/or user permissions.	4	
7.15	Ability to sort FAQs into categories and subcategories and give ownership by department.	4	
7.16	Ability to allow users to see newly-posted entries without having to refresh browser or log out.	4	
7.17	Ability to search knowledge base topics based on links to SRs.	4	
7.18	Ability to display most viewed knowledge base topics based on historical use.	4	
7.19	Ability to update the list of top knowledge base topics on a periodic basis (hourly, weekly, monthly).	4	
7.20	Ability to set optional expiration date on knowledge base topics.	4	
7.21	Ability to create knowledge base topics using pre-formatted templates for topics and FAQs.	4	
7.22	Ability to create and customize templates for creating topics and FAQs.	4	
7.23	Ability to track changes to knowledge base topics by user and date/time of change.	4	
7.24	Ability for internal users to get notifications when changes are made to a knowledge base topic or FAQs based on agency, department and division.	4	It is standard Knowledge article functionality.
7.25	Ability for administrative user to manually or automatically send notifications of changes to knowledge base topics or FAQs.	4	It is standard Knowledge article functionality, based on requirement we will need to configure rules on platform

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7.26	Ability to report usage including number of hits to knowledge base topics and FAQs and reports of search terms.	4	
7.27	Ability for links to the knowledge base to show in a pop-up window as a SR configuration is entered.	4	
7.28	Ability to integrate a knowledge base topic with a script.	4	
7.29	Ability to create an SR from a knowledge base topic.	4	
7.30	Ability to categorize knowledge base topics and FAQs based on agency, department and department divisions.	4	
7.31	Ability to archive knowledge base topics and FAQs.	4	
7.32	Ability to include and share videos in knowledge base topics and FAQs.	4	
7.33	Ability to update all knowledge base environments simultaneously.	4	
7.34	Ability to update all knowledge base environments independently.	4	
#		**Proposer Response (0-4)**	**Explanation**
8.0	**SELF SERVICE (WEB AND MOBILE APPLICATION)**		
8.1	Abilty to provide citizen-facing self-service reporting.	4	Citizens should be able to search, submit, and check status of existing SRs on Web and Mobile
8.2	Application provides a mobile application for iPhone and Android mobile phones that enable constituents to submit, update and check status of submitted service requests.	4	
8.3	Ability to push alerts to mobile devices.	4	
8.4	Ability for the County to temporarily disable all or certain self-service SRs.	4	
8.5	Ability for a constituent to use a single account log-in to submit, review and track SRs regardless of the channel used for submission.	4	**Currently citizen would need to register first before log into the web/mobile application. Login with social account is not available.**

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8.6	Ability for constituent to submit and update contact information.	4	
8.7	Ability for constituent to create and update a personal password.	4	
8.8	Ability to auto populate constituent contact information from profile onto new SRs.	4	
8.9	Ability for constituent to submit SRs anonymously and track those anonymous SRs.	4	
8.10	Ability to require email address for a particular SR configuration.	4	
8.11	Ability to create alerts to notify external customers of changes to electronically submitted requests.	4	
8.12	Ability to tailor the self-service entry forms for public use with County branding standards.	4	
8.13	Ability for web entry forms to use same business-defined editing rules as SRs entered by County users.	4	
8.14	Ability to notify constituent of the expected service level agreement for an SR and provide additional information.	4	
8.15	Ability to provide additional information defined for an SR configuration, such as questions that determine whether the appropriate SR configuration was selected.	4	
8.16	Ability for online entry page to generate error message if a required field is not completed.	4	
8.17	Ability to validate addresses entered by a constituent on a self-service request.	4	
8.18	Ability for constituent to attach a photo or document to a self-service request.	4	
8.19	Ability to create limit on number of photos or documents that can be attached to a self-service request.	4	
8.20	Ability to post self-service entries as real-time transactions to the CRM database.	4	

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8.21	Ability to display a confirmation page after submission of a self-service SR.	4	
8.22	Ability to automatically send a satisfaction survey after SR is placed in completed/closed status using existing survey tools (Qualtrics).	3	**Integration with Qualtrics as mentioned in 2.4**
8.23	Ability for constituents to opt-in/out of emails, newsletters, surveys or promotional campaigns.	4	
8.24	Ability for 311 agents to review content prior to the self-service request being processed and assigned to department.	4	This can be configured for specific types of SRs
#		**Proposer Response (0-4)**	**Explanation**
9.0	**REPORTING/DASHBOARDS**		
9.1	Abilty to Generate custom reports.	4	Salesforce includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Analytic capabilities consist of several integrated parts as outlined in our proposal response. Out-of-the box Salesforce reports and dashboards proposed. Custom reports have not been included in the SOW. If the need is identfied during discovery sessions, an LOE will be provided to implement custom reports. This applies to all the requirements in section 9.0
9.2	Ability to Generate monthly reports by service request configuration, agent, date, service request owner,	4	
9.3	Ability to deliver configurable dashboards.	4	
9.4	Ability to provide flexible reporting structure to accommodate changes to organizational structure.	4	
9.5	Ability to view service-related data for multiple SRs in table/list form.	4	
9.6	Ability to view customer-related data for multiple SRs in table/list form.	4	
9.7	Ability to allow users to create defined queries.	4	
9.8	Ability to allow user-defined date ranges	4	

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9.9	Ability to allow multiple open sessions of CRM to facilitate a query	4	
9.10	Ability to use real-time analytics to capture key reporting and metrics.	4	
9.11	Ability to customize dashboard information based on user's desired level of information	4	
9.12	Ability to display reporting information based on user's defined role within the CRM CRM Solution	4	The reporting engine in Salesforce strictly adhere to the rules set up in the sharing model and to any field level security in place. Each user, group, or role can have its own level of access to a report and dashboard folder. Because each level of access to a report or dashboard folder consists of a combination of user permissions, users of Salesforce can share relevant reports among users with confidence that the underlying security model prevents them from seeing data they cannot access. The Salesforce Sharing Model and Sharing Rules, along with the Role Hierarchy and User Profile settings, allow administrators to define, manage and view visibility and access permissions on objects (e.g., account, cases) holistically across the application. On any given data record, the administrator and others with appropriate permissions may view the reasons why certain users or groups of users have access to that data record. When field-level encryption is used to conceal fields from a particular group of users, those fields can still be used to sort the data in reports and dashboards seen by those users. This flexibility allows for meaningful reporting without compromising the security of your data. Users can also add login history to reports. Standard users will see only rows corresponding to their login history in the report and not that of other users. Reports and dashboards can also be run as another user (for example, a supervisor) provided that user grants appropriate permissions for the report or dashboard. For example, a supervisor may wish to show aggregate information in a report or dashboard to his or her team where individual team members would normally not have permissions to see a peer's data.
9.13	Ability to assign and/or link management summary reports for comparison over time.	4	
9.14	Ability to export multiple formats for Open Data	4	

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9.15	Ability to allow sub-reporting integration (e.g. Cognos and multi-platforms).	4	**Integration is needed based on the requirements.**
9.16	Ability to set report access rights based on security roles.	4	
9.17	Ability to provide reporting with no impact on CRM Solution performance.	4	
9.18	Ability to send notifications or electronic transmission/reports to internal/external customer via the CRM Solution.	4	**Based on the requirement email temaplates can be used.**
9.19	Ability to provide an unlimited number of data returns for query/SR searches.	4	
9.20	Ability to provide simplified reporting options and reporting designs.	4	
9.21	Ability to use keywords to search library for reports and reporting.	4	
9.22	Ability to allow reporting from multiple devices (mobile, tablets, etc.).	4	Salesforce 1 app will be used for mobile reporting. No custom development included in scope
9.23	Ability to provide report fields that are easily editable.	4	
9.24	Ability to support real time and batch update processing.	4	
9.25	Ability to provide event reporting based on time and location.	4	
9.26	Ability to provide variance reports comparing actual time to complete to the estimate provided	4	
#		**Response (0-4)**	**Explanation**
10.0	**APPOINTMENT SERVICE REQUESTS**		

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10.1	Ability for users to create Service Requests with an appointment selected from a dynamic list of date-and-time timeslots available in a configured booking time interval	4	Lightning Scheduler gives you the tools you need to simplify appointment scheduling in Salesforce. Create a personalized experience by scheduling customer appointments—in person, or by phone or video—with the right person at the right place and time. Lightning Scheduler Setup Assistant provides a one-stop interface with built-in examples for admins to configure Lightning Scheduler. This feature walks admins new to Lightning Scheduler through setup and includes a progress indicator. Also see: https://help.salesforce.com/articleView?id=ls_setup_assistant.htm. With Lightning Scheduler, it's easy to embed appointment scheduling into standard Salesforce workflows, such as leads and referrals, opportunities, and accounts. Here are some of the things you can do: • Create records that represent appointment attendees (service resources) and add details about their areas of expertise (skills), location, and availability • Define branch and office locations (service territories) and operating hours • Create appointment topics (work type groups), such as home loans or investment • Define appointment templates (work types), to link appointment topics with particular locations • Schedule customer appointments with defined topics, attendees, duration, and location
10.2	Ability for self-service constituents to create Service Requests with an appointment selected from a dynamic list of date-and-time timeslots available in a configured booking time interval	4	Help your community users schedule appointments quickly with a self-service interface in Lightning Scheduler. Out-of-the-box flows make it simple to search and select the right person, topic, location, and date and time.
10.3	Ability to automatically increment the available appointment number for each timeslot when an appointment is cancelled	4	
10.4	Ability for ConfigAdmins to configure date-and-time timeslots for each appointment question	4	
10.5	Ability for ConfigAdmins to configure an initial maximum capacity (Available appointments) for each date-and-time timeslot	4	

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10.6	Ability for ConfigAdmins to modify the current capacity (Available appointments) for each date-and-time timeslot including setting it to zero to disable that timeslot	4	
10.7	Ability for ConfigAdmins to configure a booking time interval for each appointment question. Only appointments available in that interval and with a current capacity of > 0 shall be displayed to users or self-service constituents for selection	4	
10.8	Ability for ConfigAdmins to add appointment questions to SR configurations, which enables Appointment Service Request functionality for such types	4	
10.9	Abilty to send notification emails and/or SMS on creation of an Appointment Service Request including reminders before the selected appointment date-and-time	4	
10.10	Ability for users to see a dashboard of available and consumed (booked) appointments per day for each of those SR configurations they are authorized to view. Daily capacities are defined as the sum of all date-and-time timeslots occuring on that day.	4	
INTEGRATION REQUIREMENTS			
#		**Response (0-4)**	**Explanation**
11.0	**INTEGRATION - ADMINISTRATION and MONITORING**		

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11.1	Ability for SysAdmins to review activity status of at minimum the following integration paths on a web-based integration dashboard: 1 CMS send enabled/paused 2 CMS receive enabled/paused 3 MCRTL send enabled/paused 4 MCTRL receive enabled/paused 5 PWS send enabled/paused 6 PWS receive enabled/paused 7 WCS send enabled/paused 8 WCS receive enabled/paused 9 TBST send enabled/paused 10 TBST receive enabled/paused 11 CV send enabled/paused 12 CV receive enabled/paused 13 EMAIL send enabled/paused 14 SMS send enabled/paused	2	A static dashboard will be developed based on the discovery session. This applies to all the requirements in 11.1
11.2	Ability for SysAdmin to use integration dashboard to pause one or more integration paths without affecting enabled integration paths, intake, self-service or other SR processing for an extended maintenance duration of at minimum seven days without data loss (Message queueing recommended)	2	The estimation is covered in 11.1
11.3	Ability for SysAdmins to use integration dashboard to define throttling as maximum records per minute for each integration path	2	The estimation is covered in 11.1
11.4	Ability for SysAdmins to insert failed records for replay into any integration path	2	The estimation is covered in 11.1
11.5	Ability for SysAdmins to access logs for each integration path and copy any record for reinsertion using a normal text editor (or SQL tool if database logs)	2	The estimation is covered in 11.1

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11.6	All records are available in rotating logs with at minimum one year history	2	
11.7	Datetime is available per line in all logs and are in Eastern Standard Time zone	2	
11.8	CRM Solution supports a REST API that allows monitoring CRM Solutions to determine the number of successful and failed records for each integration path as well as activity status	4	
#		**Response (0-4)**	**Comments**
12.0	**INTEGRATION - CONFIDENTIAL ADDRESS PROCESSING**		
12.1	Ability for users and self-service constituents to request service for confidential addresses	4	Dependent on information sent through GIS
12.2	Ability to prevent storage of property folio information for confidential addresses	4	**Incapsulate will design a process to use the available GIS information for a confidential address and use this to information to not store property folio information from the geo layers by the 311 Capsule.**
12.3	Ability to prevent storage of legal description for confidential addresses	4	**Incapsulate will design a process to use the available GIS information for a confidential address and use this to information to not store property legal description from the geo layers by the 311 Capsule.**
12.4	Ablility to prevent storage of associated contact information (i.e. name, email, phone number) with confidential addresses	4	**The 311 Capsule does not automatically store contact information based on the address.**
12.5	Ability to display confidential addresses and associated contact information to users (not to self-service constituents) and visually mark it as confidential	4	**User permissions and role will be set up to meet this requirement**
12.6	Ability to prevent self-service constituents from any access to confidential addresses and any associated contact information, unless this information is entered by the self-service constituent	4	**The 311 Capsule self service applications do not automatically store contact information based on the address**
12.7	Ability to fulfill requirements 32.1, 32.2, 32.2, 32.3, 32.4, 32.5, and 32.6 for confidential address information that is provided by an integrated application or CRM Solution	4	

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	(Integrated applications and CRM Solutions will provide a flag to indicate if an address is considered confidential.)		
TECHNICAL FUNCTIONALITY			
#		**Response (0-4)**	**Explanation**
13.0	**CONFIGURATION - USER AUTHORIZATION**		
13.1	Ability for SysAdmins to reference a hierarchical organization model (TO) of the county, with named departments, divisions, offices, agencies in at minimum 3 levels	4	OOTB Salesforce security features will be leveraged to address the requirements. During discovery if it is determined that custom code needs to be developed to address the requirements, Incapsulate will work with County to provide an LOE for implementation. This applies to all the requirements in 13.0 Access permissions are defined by a user's Profile, Role and Permission Sets. The user Profile controls access permissions to: • Applications • Connected Applications • Data Objects (Internal and External) • Login Hours and IP Ranges • Session Settings • Password Policies The user's Role, as well as the placement of that role in the organization-defined Role Hierarchy, controls user access to specific data records. For example, a user's Profile may indicate that a user has read, create, edit and delete permissions to the Contact object (table) in the database. However, the user's Role will determine which actual contact records the user will be able to access, which may be a subset of all defined contact records in the database. Permission sets allow administrators to define additional access rights that a specific user may require that do not need to be defined for the larger group a profile is attached.

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13.2	Ability for SysAdmins to create/update/delete hierarchical organization models for the City of Miami and an unlimited number of other external entities with named departments, divisions, offices, agencies in at minimum 3 levels	4	OOTB Salesforce security features will be leveraged to address the requirements. During discovery if it is determined that custom code needs to be developed to address the requirements, Incapsulate will work with County to provide an LOE for implementation. This applies to all the requirements in 13.0
13.3	Ability for ConfigAdmin to configure named access policies for sets of SR configurations to be viewable	4	OOTB : Set profiles for read only SR
13.4	Ability for ConfigAdmins to configure named access policies for sets of SR configurations to be created	4	
13.5	Ability for ConfigAdmins to configure named access policies for sets of SR configurations to be updated	4	
13.6	Ability for ConfigAdmins to grant access by associating a named access policy with one or more departments, divisions, agencies, offices	4	
13.7	Ability for ConfigAdmins to remove access by disassociating a named access policy from one or more departments, divisions, agencies, offices	4	**OOTB: Profies, Public Groups, Roles**
13.8	Ability for ConfigAdmins to use an access policy for extended status changes of SRs (Supervisor custom group)	4	
13.9	Ability for ConfigAdmins to use an access policy that allows extended modifications to SRs that are processing at an integrated departmental CRM Solution (for 311 Management custom group)	4	
13.10	Ability for ConfigAdmins to use an access policy for WCS query UI access	1	Mulesoft will be used to develop the integration. Based on the detailed requirements collected during discovery sessions, if this cannot be addressed through configuration or using OOTB features, Incapsulate will work with the County to discuss a workaround or provide an LOE for implementation
13.11	Ability for ConfigAdmins to use an access policy for Elections query UI access	1	
13.12	Ability for ConfigAdmins to use an access policy for ASD/Chameleon query UI and ASD dispatch UI access	1	
13.13	Ability for ConfigAdmins to grant access by associating a named access policy with one or more named custom access groups	4	

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13.14	Ability for SysAdmin to define custom access groups and add/remove users to such groups	4	
13.15	Access rights shall be cumulative: E.g. It can be defined that any department member may view SRs of certain types, but only members of a certain division with an additional access policy may create/update		
13.16	Ability for ConfigAdmins to define at minimum 100 named access policies and associations to at minimum 100 county or city departments, divisions, offices or agencies or external agencies using an easy-to-use web-based UI	4	**OOTB : We can have n number of profiles, roles, permission sets in the system**
13.17	Ability for ConfigAdmins to review effective permissions for each user in an easy-to-use web-based UI	4	
#		**Response (0-4)**	**Explanation**
14.0	**CONFIGURATION - SR CONFIGURATIONS**		
14.1	Ability for ConfigAdmins to associate each SR configuration with an owner division and/or department and jurisdiction defined in the organizational model	4	
14.2	Ability for ConfigAdmins to temporarily or permanently disable SR configurations, preventing new SRs from being created but still allowing SRs to be found	4	
14.3	Ability for ConfigAdmins to create new and update at minimum 400 existing SR configurations	4	
14.4	Ability for ConfigAdmins to define if an SR configuration allows anonymous submission	4	
14.5	Ability for ConfigAdmins to define if an SR configuration allows submission without address or location	4	
14.6	Ability for ConfigAdmins to define if an SR configuration requires a valid folio number	4	
14.7	Ability for ConfigAdmins to define if an SR configuration allows intersections (2 streets)	4	
14.8	Ability for ConfigAdmins to define if an SR configuration allows corridors (3 streets)	4	

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14.9	Ability for ConfigAdmins to define if an SR configuration allows areas (4 streets)	4	
14.10	Ability for ConfigAdmins to define if an SR configuration shows a user-popup-info-text (Multi-line)	4	
14.11	Ability for ConfigAdmins to define if an SR configuration allows self-service intake by constituents	4	
14.12	Ability for ConfigAdmins to define if an SR configuration shows a constituent-popup-info-text	4	
14.13	Ability for ConfigAdmins to define which integrated departmental CRM Solution an SR configuration should be routed to, if any	4	
14.14	Ability for ConfigAdmins to define a target duration in days for each SR configuration, which is used by the CRM Solution to calculate a due date for each SR	4	
14.15	Ability for ConfigAdmins to define a whether the target duration is in calendar days or county workdays, respecting weekend and county holidays	4	
14.16	Ability for ConfigAdmins to define a whether the target duration starts with the creation of the SR or with a data entered as answer to a date question	4	
14.17	Ability for ConfigAdmins to define duplicate check rules for SR configurations including lookback duration in days	4	
14.18	Ability for ConfigAdmins to define MDC GIS rules for SR configurations to prevent SR creation outside of the SR configuration's service area	4	
14.19	Ability for ConfigAdmins to create new and update existing questions of type text for SR configurations	4	
14.20	Ability for ConfigAdmins to define regular expression validation for questions of type text	4	**OOTB: Different type of flex question in SR will validate its format based on the configuration. We can also configure validation rule on flex question**
14.21	Ability for ConfigAdmins to create new and update existing questions of type multi-line text for SR configurations	4	

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14.22	Ability for ConfigAdmins to create new and update existing questions of type date for SR configurations	4	
14.23	Ability for ConfigAdmins to define date range validation for each question of type date	4	**OOTB: Different type of flex question in SR will validate its format based on the configuration.**
14.24	Ability for ConfigAdmins to create new and update existing questions of type time for SR configurations	4	
14.25	Ability for ConfigAdmins to define time range validation for each question of type time	4	**OOTB: Different type of flex question in SR will validate its format based on the configuration. We can also configure validation rule on flex question**
14.26	Ability for ConfigAdmins to create new and update existing questions of type number for SR configurations	4	
14.27	Ability for ConfigAdmins to define value range validation for each question of type number	4	**OOTB: Different type of flex question in SR will validate its format based on the configuration. We can also configure validation rule on flex question**
14.28	Ability for ConfigAdmins to create new and update existing questions of type single-select and it's selectable values for SR configurations	4	
14.29	Ability for ConfigAdmins to define for any question if an answer is required	4	
14.30	Ability for ConfigAdmins to create new and update existing questions of type multi-select and it's selectable values for SR configurations	4	
14.31	Ability for ConfigAdmins to define a pop-up text for each selectable value of single or multi-select questions	4	
14.32	Ability for ConfigAdmins to define any order of selection values for single or multi-select questions (e.g. Yes, No, Maybe)	4	
14.33	Selection values without explicit order are displayed alphanumerically for single or multi-select questions (e.g. Maybe, No, Yes) on all user and constituent screens	4	
14.34	Ability for ConfigAdmins to create new and update existing display notes, shown alongside questions	4	
14.35	Ability for ConfigAdmins to define the order of questions and display notes for each SR configuration	4	

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14.36	Ability for ConfigAdmins to define for each question if it is entered by an integrated CRM Solution, such as ASD/Chameleon or WCS in the user UI or WCS, PWS, CMS, or other after sending SR. These questions are read-only for users and constituents	4	
14.37	Ability for ConfigAdmins to select for each questions, if it is displayed during intake or resolution or both	4	
14.38	Ability for ConfigAdmins to disable questions, so that existing answers remain available but are not allowed for SRs created after a question was disabled	4	
14.39	Ability for ConfigAdmins to disable selectable values, so that existing selections remain available but are not allowed for SRs created after a selectable value was disabled	4	**OOTB: Admin can create a new version of SR with new question**
14.40	Ability for ConfigAdmins to create new and update existing workflow activities for SR configurations	4	
14.41	Ability for ConfigAdmin to setup and modify workflow process rules without required assistance/involvement from IT	4	
14.42	Ability for ConfigAdmins to define allowed outcomes for each workflow activity	4	
14.43	Ability for ConfigAdmins to define which triggers starts an activity	4	
14.44	Ability for ConfigAdmins to define time delay triggers for activities (e.g. Overdue emails)	4	
14.45	Ability for ConfigAdmins to define activity and outcome triggers for activities	4	
14.46	Ability for ConfigAdmins to define SR status change triggers for activities	4	
14.47	Ability for ConfigAdmins to define MDC GIS geo layer/value match triggers for activities	4	
14.48	Ability for ConfigAdmins to define question/answer match triggers for activities	4	

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14.49	Ability for ConfigAdmins to define staff assignment rules for activities	4	
14.50	Ability for ConfigAdmins to define email and sms templates for activities	4	
14.51	Ability for ConfigAdmins to use variables referring to any SR data item in email and sms templates (e.g. Address, Sr#, answer to question, activity notes, staff assigned name, email, constituent contact information, etc.)	4	
14.52	Ability for ConfigAdmins to define auto-close for activities on start with a default outcome	4	
14.53	Ability for ConfigAdmins to define auto-close for activities after time delay with a specified outcome, effective if no outcome was selected before time delay expires	4	We can configure process builder/flow based on requirement for auto closure.
14.54	Ability for ConfigAdmins to define auto-close for activities on trigger with a specified outcome	4	
14.55	Ability for ConfigAdmins to define allowed participant types for SR configurations (e.g. constituent, employee, assignee, pet owner, WCS account owner, etc.)	4	New secondary contact types can be configured by SR type
14.56	Ability for ConfigAdmins to test any SR configuration change in a test CRM Solution as specified in the test CRM Solution section below	4	
14.57	Ability for SysAdmins to revert one or more SR configuration changes in the test or production CRM Solution	4	
14.58	Ability for ConfigAdmins to review all SR configuration changes in a change history view	4	
14.59	Ability for ConfigAdmins to schedule a set of new SR configuration changes for automated production deployment	4	
14.60	Ability for SysAdmins to review and approve SR configuration changes for automated production deployment	4	**Admin can create multiple version of SR and based on the workflow/requirement in production system, they can enable/diable after functional approval.**
#		**Response (0-4)**	**Explanation**

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15.0	**CONFIGURATION - GIS**		
15.10	Ability for MdcDevelopers to modify any GIS service configuration in the CRM Solution	**4**	**All limitation of city provided GIS will apply.**
15.20	Ability for MdcDevelopers to adapt the CRM Solution to GIS service changes, such as removed GIS fields, new locator use	**4**	**All limitation of city provided GIS will apply.**
15.30	Ability for MdcDevelopers to configure the appearance of any GIS feature layer visible in the CRM Solution using ESRI json objects	**4**	**All limitation of city provided GIS will apply.**
#		**Response (0-4)**	**Explanation**
16.0	**CRM Solution - Environments**		
16.1	Ability to have a training environment	4	
16.2	Ability to have a development environment	4	
16.3	Ability to have a staging environment	4	
16.4	Ability to have a production environment	4	
16.5	Ability to easily promote changes from development to staging	4	
16.6	Ability to easily promote changes from staging to production	4	
16.7	Ability to easily reset and sync training environment with production, having it mirror production	4	
#		**Response (0-4)**	**Explanation**
17.0	**DEVELOPMENT CRM Solution**		
17.1	Ability to test any SR configuration change in a development CRM Solution that closely resembles production	4	
17.2	A test self-service app is available for Android and iPhone	4	
17.3	A test self-service web component is available	4	

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17.4	A test integration dashboard controlling integrated departmental test CRM Solutions is available	4	
17.5	The development CRM Solution integrates with various departmental test/development CRM Solutions	4	
17.6	The development CRM Solution user experience is similar to production in all aspects including responsiveness	4	
17.7	Data created in the development CRM Solution is stored independently of production data	4	
17.8	Development CRM Solution SMS/text messages are sent to a county provided list of recipients instead of the actual recipient that the production messaging CRM Solution would send to	4	
17.9	Development CRM Solution emails include a header that shows production recipients of the email	4	
17.10	Ability to test user permission changes	4	
17.11	Ability to test changes to any integrated departmental test/development CRM Solution	4	
17.12	Ability to use the development CRM Solution for user training purposes	4	
17.13	Ability to use the development CRM Solution to test self-service changes (Web and app)	4	
#		**Response (0-4)**	**Explanation**
18.0	**CONCURRENT CHANGES**		
18.1	Ability to prevent overwriting of any SR change if two or more users modify the same SR concurrently	4	Since we are a web application, we support a concurrency model inline with the web delivery model that allows concurrent access to the same record. In a web application model, record-level locking is not best practice. Rather, Salesforce services supports a rich data security model to easily control what users have access to records and what type of access they have to support effective collaboration. Under this, we support a last-in-change-wins model.

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			If multiple users are updating the same record simultaneously the system will notify a user if a record was updated during their current transaction. They will not be able to perform their change until they cancel their current attempt to change the record and start over. Additional information around Record Locking can be found here: https://developer.salesforce.com/docs/atlas.en-us.draes.meta/draes/draes_object_relationships_record_level_locking.htm
18.2	Ability to prevent overwriting of any SR change if users or departmental interface processing modify the SR concurrently	4	Since we are a web application, we support a concurrency model inline with the web delivery model that allows concurrent access to the same record. In a web application model, record-level locking is not best practice. Rather, Salesforce services supports a rich data security model to easily control what users have access to records and what type of access they have to support effective collaboration. Under this, we support a last-in-change-wins model. If multiple users are updating the same record simultaneously the system will notify a user if a record was updated during their current transaction. They will not be able to perform their change until they cancel their current attempt to change the record and start over. Additional information around Record Locking can be found here: https://developer.salesforce.com/docs/atlas.en-us.draes.meta/draes/draes_object_relationships_record_level_locking.htm
#		**Response (0-4)**	**Explanation**
19.0	**COMPATIBILITY AND COMPLIANCE**		
19.1	The CRM Solution's web interface is fully functional and renders equally on a set of desktop and mobile browsers specified by the county	4	Browsers & devices supported by Salesforce: https://help.salesforce.com/s/articleView?id=release-notes.getstart_browsers_sfx.htm&type=5&release=238
19.2	The CRM Solution's self-service web interface is fully functional and renders equally on a set of desktop and mobile browsers specified by the county	4	Browsers & devices supported by Salesforce: https://help.salesforce.com/s/articleView?id=release-notes.getstart_browsers_sfx.htm&type=5&release=238
19.3	The CRM Solution's self-service app is fully functional and renders equally on a set of android and iPhone operating CRM Solution versions and devices specified by the county	4	Browsers & devices supported by Salesforce: https://help.salesforce.com/s/articleView?id=release-notes.getstart_browsers_sfx.htm&type=5&release=238
19.4	The CRM Solution's web interface for users is ADA compliant to a degree specified by the county	4	ADA Compliance VPAT (Voluntary Product Accessibility Templates) for core Salesforce platform components can be found here: https://www.salesforce.com/company/legal/508_accessibility. Our Capsule solution generally conforms to 508 standards, we are happy to work with the County post-award to provide compliance where needed.

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19.5	The CRM Solution's self-service web interface is ADA compliant to a degree specified by the county	4	Please see our response to item 19.4 above.
19.6	The CRM Solution's self-service app is ADA compliant to a degree specified by the county	4	Please see our response to item 19.4 above.
19.7	The CRM Solution's web interface for users is fully compliant with MDC's privacy policy	4	
19.8	The CRM Solution's self-service app is fully compliant with MDC's privacy policy	4	
19.9	The CRM Solution's web interface for users is fully compliant with MDC's Liability Disclaimer and User Agreement	4	
19.10	The CRM Solution's self-service app is fully compliant with MDC's Liability Disclaimer and User Agreement	4	
#		**Response (0-4)**	**Explanation**
20.0	**CAPACITY & PERFORMANCE**		
20.1	Reporting loads do not affect operational performance	4	Salesforce has a track record of fast application performance from delivering web pages to processing transactions. Within each logical system, we use load balancers to distribute load among multiple web and application servers for additional scalability and redundancy. The multi-tenant application design combined with the fastest servers and high-performance networking infrastructure available guarantees lightning-fast performance. We run our cloud-computing services with redundant network vendors delivering high performance network access to our facilities worldwide, as well as the fastest hardware and software servers available. Response times may vary due to multiple external variables outside of the control of Salesforce, including Customer network latency and user device. For more information please refer to the trust website: https://trust.salesforce.com.

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20.2	The CRM Solution is designed to manage at minimum 30 million open and closed SRs in storage	4	Salesforce provides extensive storage capabilities. Storage is divided into two categories: file storage and data storage. File storage includes files in attachments, the Documents tab, the Files tab, the File field, Salesforce CRM Content, Chatter (including user photos), and Site.com assets. Data storage includes the following entities/records stored within the Salesforce application: Accounts, Article types, Article type translations, Campaigns, Campaign Members, Cases, Case Teams, Contacts, Contracts, Custom objects, Email messages, Events, Forecast items, Google docs, Ideas, Leads, Notes, Opportunities, Opportunity Splits, Orders, Quotes, Quote Template Rich Text Data, Solutions, Tags: Tag applications, Tags: Unique tags, and Tasks. Storage allocation is per Salesforce edition and number of standard licensed users in your organization. For file storage, all editions are allocated 10 GB of file storage per org. Orgs are also allocated 2 GB of file storage per user license. For example, an Unlimited Edition organization with 600 users receives 10 GB, plus an additional 1,200 GB of file storage (2 GB per user multiplied by 600 users). For data storage, all editions are allocated 10 GB for data storage, plus incrementally added user storage. For example, an Unlimited Edition organization with 10 users receives 10 GB, plus 200 MB (20 MB per user multiplied by 10 users). The breakdown of storage allocation for each edition is described here: https://help.salesforce.com/articleView?id=overview_storage.htm&type=5. Additional storage can be purchased, or files can be exported and archived outside of Salesforce, thus freeing up file storage space.
20.3	The CRM Solution is designed to manage at minimum 1 million new SRs per year or at minimum 2000 per day	4	Please see our response to item 20.2 above.
20.4	The CRM Solution is designed to handle at minimum 2500 SR updates per day	4	Please see our responses to 20.2 above and 20.5 below.

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20.5	The CRM Solution is designed to handle at minimum 5000 concurrent county and municipality users	4	Salesforce is a pure multi-tenant, cloud-based web application. Multi-tenancy gives applications elasticity. Salesforce applications can automatically scale from one to millions of users. Processing more than 5 billion transactions each day, Salesforce is used for large-scale deployments. Any application that runs on the Salesforce Platform is automatically architected to seamlessly scale from 1 user to millions of users without the customer having to do anything differently. All applications (including mobile, offline and read-only options) and data running on the Salesforce Platform are deployed to and replicated across multiple data centers in different geographies. Every application, no matter how large or small, gets the full benefits of the backup, failover, disaster recovery, and other infrastructure services required for an organization's mission-critical applications.
20.6	Loading an SR by any user completes in < 1 secs 95% of the time even under high daily load	4	**Please see our response to item 20.1 above.**
20.7	Saving or updating an SR by any user completes in < 1 secs 95% of the time even under high daily load	4	Please see our response to item 20.1 above.
20.8	The first page of SR search results with less than 1000 Srs loads in < 5 secs 95% of the time even under high daily load	4	**Please see our response to item 20.1 above.**

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20.9	record count limitations that would either cause you to be charged overage fees or block the creation of new records until your account is upgraded	4	System Overview In addition to the Salesforce Trust site (trust.salesforce.com) to monitor uptime and performance, the County will also have access to a System Overview, which will help you monitor performance and usage of your own Salesforce org. This overview includes: • Schema - # and % of custom objects and data storage • API Usage - # and % of requests in the last 24 hours • Business Logic - # and % of Rules, Apex triggers and classes, as well as % of code used • User Interface - # and % of custom apps, published Site.com sites, active Salesforce Platform Sites, active flows, custom tabs and Visualforce pages • Most Used Licenses - the top three used licenses for your organization • Portal Roles - # and % for total Partner Portal, Customer Portal and Communities roles In addition, Salesforce Optimizer takes the guesswork out of how to best maintain features in your Salesforce Org, so they can be optimized to help your users get work done. You can run Optimizer in sandbox or production environments to receive recommendations to improve features, clean up customizations, reduce complexity, and drive feature adoption. For example, Salesforce Optimizer reports on these items in its analysis: • File storage limits • Data storage limits • New Apex and Visualforce code that's running on out-of-date API versions • Page layouts that aren't assigned to record types • Record types that aren't assigned to profiles • Roles that aren't assigned to users • Users who access Salesforce on unsupported browsers • Users that are using Salesforce Mobile app • Reports and dashboards that haven't been run in more than a year

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			If your implementation uses workflow rules, Optimizer suggests resources to migrate your workflow rules to processes in Process Builder. If Duplicate Management isn't enabled, Optimizer suggests enabling it to help your users avoid creating redundant records. To start your evaluation, kick off Optimizer. After the Salesforce analysis is complete, Salesforce emails you a personalized Optimizer report with advice and recommendations about how to improve your implementation for certain features and customizations that Optimizer evaluates. Some features and customizations you still need to evaluate yourself. After we email you your Optimizer report, use the recommendations in your report to tweak features and settings to improve your implementation. For more information, please see: https://help.salesforce.com/articleView?id=optimizer_kick_off.htm&type=0. In addition the Lightning Usage App, also includes page performance by browser, page load time or experienced page time.
20.10	existing and growing API option within your CRM to better guarantee your ability to connect other important technologies further down the road	4	
20.11	The CRM Solution shall expect up to 1 million installations of the self-service mobile app.	4	
20.12	For emergency situations, the CRM Solution shall allow a new SR and SR update throughput of at least 500 SRs per minute.	4	Incapsulate has worked with multiple clients in creation of SRs for emergency situations such as natural disasters and global pandemic.
#		**Response (0-4)**	**Explanation**
21.0	**EXTENSIBILITY**		
21.1	Ability for MdcDevelopers to modify the appearance of any user screen (e.g. for county branding)	4	
21.2	Ability for MdcDevelopers to modify the appearance of any web self-service screen (e.g. for county branding)	4	
21.3	Ability for MdcDevelopers to modify the appearance of any self-service app screen (e.g. for county branding)	4	

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21.4	Ability for MdcDevelopers to extend the CRM Solution by new channels such as Amazon Alexa, Google Home or others	4	The proposed CRM system has the capability to integrate to different channels. Building out the integration has not been included in the scope of the current SOW
21.5	Ability for MdcDevelopers to integrate the CRM Solution's web self-service into other county mobile Android or Apple IOs apps with full functionality including constituent authentication(e.g. ReadyMDC)	4	Mulesoft or Open 311 API can be used here. Building out the integration has not been included in the scope of the current SOW
21.6	Ability for MdcDevelopers to integrate new departmental CRM Solutions or modify existing integrations (e.g. Transit requests, successor CRM Solutions)	4	Mulesoft or Open 311 API can be used here. Building out the integration has not been included in the scope of the current SOW
#		**Response (0-4)**	**Explanation**
22.0	**DATA MIGRATION**		
22.1	Ability to import at minimum 6 million SRs from the current 311Hub CRM Solution	4	
22.2	Ability to import at minimum 450 SR configurations from the current 311Hub CRM Solution	4	
22.3	Ability to import at minimum 150 access policies from the current 311Hub CRM Solution	4	It will be determined during the discovery phase if migration of existing access policies makes sense or if it would be better to build new access policies using standard Salesforce capabilities
22.4	Ability to import the City Of Miami hierarchical organizational model	4	
22.5	Ability to import all SR owner associations of each SR to an organizational unit in the hierarchical organizational models	4	
#		**Proposer Response (0-4)**	**Explanation**
23.0	**SECURITY**		

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23.1	Creates and maintains a running log of all administrative and user actions	4	Core Auditing Capabilities Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include: • Record Modification Fields - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information. • Field History Tracking - Enable auditing for individual fields (up to 20 fields per object), which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing. • Login History - Review up to 20,000 successful and failed login attempts to your organization for the past six months. The County can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary.

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			what times your users are logging into and out of your organization. This includes insight into what Salesforce applications are being adopted by users, who is logging in and from where, what pages users are viewing, what knowledge articles users are viewing, what reports users are running and exporting, which search terms users are using and what individual users click, and other aspects of application usage. This capability helps you discriminate between valid and invalid login requests and also track user login patterns for future reference. For example, depending on your org settings, admins can log into Salesforce as another user. You can use Login As event type data to review those actions to identify any security breaches or vulnerabilities, and also to inform your users what occurred. Not only can the County better understand how your apps are being utilized, you can also monitor if users download large amounts of data that might put your organization at risk. The County can also determine if an employee is unnecessarily downloading sensitive customer information, pinpointing the exact time and location of that event. Event Monitoring is delivered as an API-first feature and there are Salesforce partners with visualization tools available. Use the SOAP API and REST API resources to retrieve event log files that contain information useful for assessing organizational usage trends and user behavior. Because event log files are accessed through the Salesforce Platform SOAP API and REST API, you can integrate log data with your own back-end storage and data marts so that you can correlate data from multiple organizations and across disparate systems easily. When using event monitoring, keep the following in mind: • Log data can be deleted by your Salesforce administrator. You can't insert or update log data. • Use the EventType field to determine which files were generated for the County. • An event generates log data in real time. However, log files are generated the day after an event takes place, during non-peak hours. Therefore, daily log file data is unavailable for at least one day after an event. For hourly log files, depending on event delivery and final processing time, an event is expected to take three to six hours from the time of the event to be available in the log file. However, it can take longer. • Log files, represented by the EventType field, are only generated if there is at least one event of that type for the day or hour. If no events took place, the file isn't generated. • Log files are available based on CreatedDate for the last 30 days when organizations purchase User Event Monitoring • All event monitoring logs are exposed to the API through the EventLogFile object. However, there is no access through the user interface, except through the Event Monitoring Analytics app. • Hourly event log files are provided for you to review events in your orgs on an accelerated basis. However, it's possible that you don't get all event log data in hourly event log files,

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			especially during site switches, instance refreshes, or unplanned system outages. For complete data, use the daily log files. Event monitoring can be used with 49 different event types. For more information please see: https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_eventlogfile_supportedeventtypes.htm. Real-Time Event Monitoring With the Real-Time Event Monitoring feature, you can stream and store event data and create transaction security policies for several new events in Salesforce, all in real time. When you enable Real-Time Event Monitoring, you automatically get Enhanced Transaction Security—Salesforce's latest and greatest feature for creating transaction security policies. Use Event Manager to view and monitor events in your org. For more information, please see: https://help.salesforce.com/articleView?id=real_time_event_monitoring_overview.htm. Enhanced Transaction Security Enhanced Transaction Security policies give your organization the ability to take real-time security actions based on event triggers. With Enhanced Transaction Security, you can monitor events according to the policies that you establish. When a policy is triggered, you can receive a notification and/or take an action. For example, suppose that you activate a policy to limit the number of concurrent sessions per user to three. A user with three login sessions tries to create a fourth session. The County can require a user to end one of their existing sessions before proceeding with the new session. At the same time, you are notified that the policy was triggered. For more information, please see: https://help.salesforce.com/articleView?id=enhanced_transaction_security_policy_types.htm. Event Monitoring Analytics App The County can use the built-in Event Monitoring Analytics App to explore your monitoring data in Salesforce. The Event Monitoring Analytics App integrates with Event Monitoring and Setup Audit Trail data to give you insights into your user and org behavior. App creation is easy and with its pre-built dashboards and datasets, you can start exploring right away. This app helps you drill into your org's data and swiftly identify suspicious behavior, slow page performance, and poor user adoption. Get valuable information instantly from your Salesforce event logs, such as the number of people and IP addresses accessing your org, which Visualforce requests are timing out, and which users make changes in Setup. The County can detect performance problems early, such as queries taking too much time, by getting notifications when a KPI value exceeds your established threshold. Hourly event log file integration with the Event Monitoring

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			Analytics app is unavailable. Data is refreshed once a day in the app. For more information, please see: https://help.salesforce.com/articleView?id=bi_app_admin_wave.htm. Field Audit Trail (Additional License Option) Organizations desire certainty that their data is accurate, complete and reliable, enabling them to meet stringent industry regulations. With the addition of Field Audit Trail, the County's ability to track changes at the field level increases from 20 fields to 60 fields per object and log availability increases from 18 months to 10 years. The County can also set different policies for each Salesforce object to ensure data is purged when no longer needed. For more information, please see https://help.salesforce.com/articleView?id=field_audit_trail.htm.
23.2	Creates routine data backups and point-in-time snapshots to protect against data loss	4	Salesforce maintains a Disaster Recovery plan that supports a robust business continuity strategy for the production services and platforms. The Disaster Recovery Plan has been developed from industry-accepted methodologies and encompasses principles of high-availability engineering. The Disaster Recovery plan is constantly measured against strict regulatory and governance requirements, and is a crucial part of the acceptance plan when making changes or additions to the production environment. Each Salesforce instance is built and maintained in two geographically separate locations. An instance is actively served from one location (the active site) with transactions replicating in near real-time to the other completely redundant location (the ready site). This infrastructure model allows us to switch the location of the active site for maintenance, compliance, and disaster recovery purposes, which is referred to as a site switch. Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the active data center, and then cloned at a ready data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4 hour recovery point objective (RPO) and 12 hour recovery time objective (RTO). As part of our Continuous Site Switching program, Salesforce switches the active and ready instance locations approximately once every 6 months. Continuous site switching allows us to continuously improve our operations and infrastructure in order to provide you with the high availability of our services you've come to expect. In addition, continuous site switching satisfies

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			the internal compliance requirement of many of our customers that their instances are capable of being served from either geographic location throughout the year. Additional details on Salesforce's Disaster Recovery can be provided with the execution of an NDA between Salesforce and the County.

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Exhibit B – Interface Business Use Case Development Matrix / Interface Matrix

Contractor shall develop and provide the interfaces, including associated functionality, outlined in the matrix below using Subcontractor or Mulesoft APIs. Integration with the 3rd party system will be done via Mulesoft which has the capabilities to establish integrations between 2 systems. The exact scope solution is to be defined after discovery. This integration assumes that the 3rd party system has APIs available for the integration. Any custom development and changes to the Capsule data model, 3rd party system behavior, custom development, and APIs are considered to be out of scope. If during the discovery sessions, it is determined that custom code would be needed to address any of the integration requirements, Contractor will work with County to provide a workaround or an LOE for implementation.

Acceptance Policy: The County is willing to make reasonable business process changes rather than expecting the System to conform to every aspect of current system/processes in order to provide functionality. Contractor acknowledges and agrees that the County shall not be considered unreasonable for withholding or failing to grant Acceptance of any functionality due to the following items:

- Functionality fails to conform to any legislative mandates, including implementing/administrative orders
- Manner in which functionality is delivered creates undue impact to operations (i.e. a significant increase in the number of steps required to complete a task)
- Manner in which functionality is delivered results in a loss of functionality currently available in the legacy system which supports a business operation

	Application	Group	Incapsulate Deliverable	Functionality
1	GIS	MDC	Real time ESRI Integration using the 311 Capsule built in ESRI Integration	Functionality to support a real time interface between the CRM and MDC ESRI services and locators when determining the location of service requests and geocoding of addresses, intersections and GIS layers. Interface should entail the following functions: • During intake and creation of a new service request type, use the 311 Capsule map viewer and location details configuration for each service request type to display the MDC GIS maps and layers to help the user determine and define the location of the SR. • During SR processing use GIS

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				data stored with the SR for routing, workflow, notifications and other location based functionality. • During self service use by the public of the web portal or mobile app, use the MDC GIS ESRI services to help the public identify and define the location of the SR.
2	**Waste Collection System (WCS)**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Waste Collection System. Interface should entail the following functions: • ability for integration to the system to determine if bulky item pickup is free or if a charge would be required based on account. • ability integration to send SRs to waste and receive updates on status and resolution from Waste system • ability for constituents to submit Bulky Trash or Garbage Missed SRs via self service web portal or mobile apps
3	**Public Works Systems (PWS)**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Public Works System. Interface should entail the following functions:

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				• ability for integration to send SRs to the PWS Departmental Resolution processing application • ability for PWS to update SR information in the CRM • CRM duplicate checking will only send the original SR to PWS, and after PWS updates the CRM with status updates, the CRM will close all duplicates • ability for PWS to send new SRs to the CRM
4	**Mosquito Control System (MCTRL)**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Mosquito Control System. Interface should entail the following functions: • ability for integration to send SRs to the MCTRL SR Resolution processing application • ability for MCTRL to update SR information in the CRM • CRM duplicate checking will only send the original SR to MCTRL, and after MCTRL updates the CRM with status updates, the CRM will close all duplicates
5	**Regulatory & Economic Resources (RER) Department Case**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and

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	Management System (CMS)			MDC RER CMS. Interface should entail the following functions: • ability for integration to send SRs to the CMS SR Resolution processing application • ability for CMS to update SR information in the CRM • CRM duplicate checking will only send the original SR to CMS, and after CMS updates the CRM with status updates, the CRM will close all duplicates • ability for CMS to send new SRs to the CRM
6	**Transit Bus Stop Management System (TBST)**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Transit Bus Stop Management System (TBST). Interface should entail the following functions: • ability for integration to send SRs to the TBST SR Resolution processing application • ability for TBST to update SR information in the CRM • CRM duplicate checking will only send the original SR to TBST, and after TBST updates the CRM with status updates, the CRM will close all duplicates

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7	**City of Miami CitiView System (CV)**	City of Miami	Real time using Mulesoft	Functionality to support a real time interface between the CRM and City of Miami CitiView (CV) System. Interface should entail the following functions: • ability for integration to send SRs to the CV system • ability for CV to update SR information in the CRM • ability for CV to send new SRs to the CRM
8	**Animal Services System**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Animal Services System. Interface should entail the following functions: • ability to allow CRM users to search Chameleon for animal owner and license information to be used as a SR contact in the CRM
9	**Elections System**	MDC	Real time using Mulesoft	Functionality to support a real time interface between the CRM and MDC Elections System. Interface should entail the following functions: • ability allow CRM users to query the Elections System for contact or voter registration records using multiple search criteria • ability to allow CRM users to view voter registration records and voter history

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EXHIBIT B – INTERFACE MATRIX

The Solution shall provide the interfaces outlined in the matrix below. The following response codes are utilized to clarify the level of development required to meet the requirement:

In order for the County to understand how Proposers intend to deliver the identified interfaces detailed below, the Proposer's response shall provide the appropriate response code as defined below in the Response column. Proposers should provide a detailed description in the Explanation column for each item listed in the chart, regardless of response code. Exhibits may be included and referenced where applicable.

County requires all work to be completed prior to Go-Live so that adequate testing can be performed to validate the interface.

The acceptable responses are as follows below:

0 -	**No** Requested interface functionality does not presently exist and will not be developed. If this response code is utilized, Proposers should indicate if they are willing to grant access to a third party to perform the custom interface development.
1 -	**Complete Development** Requested interface functionality does not presently exist and will require full development in the proposed CRM Solution to operate.
2-	**Significant Development** Requested interface functionality minimally exists but will require considerable software modifications/customizations in the proposed CRM Solution to operate.
3 -	**Minimal Development** Requested interface functionality is presently available and can be established with minimal development, if any. If subject matter expertise and services on the proposed CRM Solution are required to be performed by the Proposer in order to configure and provide the interface, please detail the nature of the configuration.
4-	**Out of the Box with Configuration** Requested interface functionality is available in the solution out of the box and only requires configuration.

Functionality which includes a "0" response code or appear in strikethrough font shall be considered to be outside of the scope of this Contract, unless otherwise mutually agreed by the parties in writing, executed by authorized individuals. Functionality which includes a "1", "2" or "3" which required development in order to be delivered must be completed, undergo UAT, and Accepted by the County in accordance with the Acceptance Policy outlined below prior to Final Acceptance in accordance with the provisions of Appendix A (Scope of Work).

Acceptance Policy: The County is willing to make reasonable business process changes rather than expecting the Solution to conform to every aspect of current system/processes in order to provide functionality. Contractor acknowledges and agrees that the County shall not be considered unreasonable for withholding or failing to grant Acceptance of any functionality due to the following items:

- Functionality fails to conform to any legislative mandates or applicable law

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- Manner in which functionality is delivered creates undue impact to operations (i.e. a significant increase in the number of steps required to complete a task)

Manner in which functionality is delivered results in a loss of functionality currently available in the legacy system which supports a business operation

Definitions:	Description
ADA	Americans with Disabilities Act
CMS	Refers to the MDC Regulatory Economic Resources department's Case Management System and its successor system
County	Miami-Dade County or Miami-Dade County government
CV	Refers to the City of Miami's CitiView System and its successor system
Folio number	The folio number is a means by which properties are identified in Miami-Dade County. It is also referred to as the parcel identifier and represents a unique number that computer systems use to associate to a property. The folio number is formatted as a 13 digit number (99-9999-999-9999) and may start with 0.
MCTRL	Refers to the MDC Solid Waste Management department's Mosquito Control System
MDC	Miami-Dade County or Miami-Dade County government
MDC GIS	Refers to both GIS teams of the Miami-Dade County IT department or their services
PWS	Refers to the MDC Transportation and Public Works department's Public Works System and its successor system
SR	A service request (instance) of one particular SR type including all data, such as SR number, participants, answers to questions, location, workflow, created date, closed date, due date, intake method, status, GIS data, and property information. This definition includes requests for service as well as problem reports.
SR configuration	A service request type or configuration, which defines duration, questions, possible workflow activities with outcomes, possible participant types, triggers, email/sms templates, etc.
System	General term for the system provided by the vendor, which may -depending on architecture choices- also refer to integration components, vendor provided middleware, etc.
WCS	Refers to the MDC Solid Waste Management department's Waste Collection System and its successor system

User Roles:	Description
User	A user of the system that is in a work relationship with Miami-Dade county, the City of Miami or any other external agency and who holds specific department/division identifiers and credentials known to county principal stores. For a user, a county issued id, password, first name and last name are always

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	known. Email, Phone, profile image, and/or addresses are known for most, but not all users. Authorizations to SRs, UI elements or status changes, are mostly derived from access policies associated with the user's department and/or division. In addition, users can be added to custom ldap groups, thereby additional authorization is granted. One example for custom groups are supervisors of each department or division with additional access policies (311Supervisor).
Constituent	A Miami-Dade County resident, citizen, visitor, or any other person using the system's self-service web component or self-service app. A resident may or may not have an account registered at miamidade.gov.

Administrative Roles:	Description
SysAdmin	An MDC IT role that includes all permissions of ConfigAdmin and extended permissions as specified
ConfigAdmin	A 311 or departmental, City of Miami or external agency role that is permitted to create and/or modify SR types and user authorization rules. May also test and deploy such changes to production with a SysAdmin approval step.

Other Roles:	Description
MdcDeveloper	A member of the Miami-Dade County IT department that creates and/or modifies IT systems. The definition includes web designers.

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#	INTERFACE FUNCTIONALITY	Proposer Response (0-4)	Explanation
1.0	**INTEGRATION - MDC EMAIL**		
1.1	Ability to configure county provided SMTP servers to send all SR related emails	4	SR related email will be set from Salesforce only, no need to integrate it with SMTP
1.2	Ability to configure one or more county provided inboxes to receive SR related emails	4	
1.3	Ability to continue SR processing if SMTP services are down without losing emails	4	
1.4	Ability to configure a county provided default sender email address	4	
1.5	Ability to configure a county provided default bcc email address	4	
1.6	Ability to store all sent emails for county review	4	
1.7	Ability for SysAdmins to modify above email configuration on demand for immediate production implementation	4	
#		**Proposer Response (0-4)**	**Explanation**
2.0	**INTEGRATION - MDC SMS**		
2.1	Ability to configure county provided SMS services to send text messages	4	
2.2	Ability to configure one or more county provided SMS services to receive text messages	4	
2.3	Ability to continue processing if the SMS service is down without losing text messages	4	
2.4	Ability to store all sent text messages for county review	4	
2.5	Ability for SysAdmins to modify above SMS configuration on demand for immediate production implementation	4	
#		**Proposer Response (0-4)**	**Explanation**

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3.0	**INTEGRATION - MDC 311 PHONE SYSTEM (AVAYA)**		
3.1	Ability to integrate with an S8700 PBX Avaya Telephone System (communication manager v.6.2 and higher)	4	
3.2	Ability to integrate with Avaya Call Management System (CMS) API's	4	
3.3	Ability to integrate with Avaya CMS reporting of call statistics via ODBC	4	
3.4	Ability to provide full softphone capabilities to answer, initiate, hold, transfer, conference all calls, and include call duration, call history, caller ID	4	
3.5	Ability to integrate with Avaya One X agent used for soft phone and remote call takers (v.2.5.5 and higher)	4	
3.6	Ability to integrate with additional cloud based contact center platform	4	
#		**Proposer Response (0-4)**	**Explanation**
4.0	**INTEGRATION - MDC AUTHORIZATION AND AUTHENTICATION**		
4.1	Ability to integrate with the miamidade.gov registration system (Oauth constituent credential repository) for constituent self-service authentication	3	
4.2	Ability to integrate with the miamidade.gov registration system (Oauth constituent credential repository) for constituent account lookup by users of the system	3	
4.3	Ability to integrate the self-service web component with miamidade.gov authentication for Single-Sign-On, so that a constituent already logged into miamidade.gov is seamlessly authenticated in the system's self-service web component and vice versa	3	
4.4	Ability to integrate the self-service web component with miamidade.gov	3	

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	authentication for Single-Sign-Off, so that a constituent logging off miamidade.gov is seamlessly logged off from the system's self-service web component and vice versa		
4.5	Ability to integrate the self-service app with miamidade.gov authentication, so that a constituent can use her miamidade.gov credentials to unlock app features that require authentication, such as SR history	3	
4.6	Ability to integrate with the miamidade.gov registration system for new constituent account creation and account updates by system users (e.g. name, email, phone numbers, addresses or other data)	3	
4.7	Ability to allow constituents to submit self-service SRs through the system's self-service web component without authentication, if the SR configuration allows anonymous submission	3	
4.8	Ability to allow constituents to submit self-service SRs through the system's self-service app without authentication, if the SR configuration allows anonymous submission	3	
4.9	Ability to integrate with Miami-Dade ITD's security systems for user authentication and user/assignee lookup	3	
4.10	Ability to integrate with Miami-Dade ITD's security systems for user authorization based on (employment) status, departmental and divisional membership identifiers	3	
4.11	Ability to integrate with Miami-Dade ITD's security systems for user data inclusion in SRs, messages, reports, or for other system needs	3	

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#		Proposer Response (0-4)	Explanation
5.0	**INTEGRATION - MDC GIS - INTAKE**		
5.1	Ability to exclusively use MDC provided address locators for the geocoding of addresses and intersections, and landmarks	4	
5.2	Ability to select one geocoding match out of multiple candidates	4	
5.3	Ability to exclusively use MDC provided ESRI locators for reverse geocoding	4	
5.4	Ability to consume ArcGIS Online and MDC Gis ESRI services	4	
5.5	Ability to geocode only to property addresses with folio number if the SR configuration is configured for mandatory folio number	4	
5.6	Ability to geocode to property addresses or street addresses dependent on SR configuration	4	
5.7	Ability to geocode to intersections when 2 streets are entered and the SR configuration allows intersections	4	
5.8	Ability to do a point in polygon determination of various MDC GIS layers based on point returned from geocoded address, intersection or point from map to determine service area for a request and any other informational GIS values required for that request	4	
5.9	Ability to pull attribute information off a GIS feature class with line geometry based on a geocoded point	4	
5.10	Ability to accept three streets for a corridor and interface with MDC web services or geoprocessing services for validation	4	
5.11	Ability to accept 4 streets for an area and interface with MDC web services or geoprocessing services for validation	4	

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5.12	Ability to accept a condo unit number address and access MDC locator and store unit number	4	
5.13	Ability to store all addresses using USPS Address Standards	4	
5.14	Ability to store a folio number with each property address and each condo unit	4	
5.15	Ability to store a unit number and condo folio number with each multi-family property address	4	
5.16	Ability to store a folio number, municipality, and zip5 code for empty lots without address, selectable through reverse geocoding via map	4	
5.17	Ability to store a projected location x/y with each SR according to MDC GIS standards (NAD_1983_StatePlane_Florida_East_FI PS_0901_Feet)	4	
5.18	Ability to collect and display MDC provided GIS layer data for each location consisting of at minimum 40 display fields, provided by different MDC GIS feature layers	4	
5.19	Ability to collect and display property information data for each address consisting of at minimum 50 display fields including Assessment history, Exemption history, Taxable value history and Sale history	4	
5.20	Ability to detect multi-family buildings based on MDC GIS provided data and select a unit number from all available units or the building	4	
5.21	Ability to display a detachable linked map (Separate window) that can be used on a second monitor during intake	4	
5.22	Flexible map ability to manually select property, street address, or intersection	4	

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	and validate the address using MDC locators		
5.23	Map ability to select one geocoding match out of multiple candidates	4	
5.24	Map ability to display latest MDC GIS provided county imagery	4	
5.25	Map ability to display latest MDC GIS provided street map layer	4	
5.26	Map ability to toggle between multiple base maps provided by Miami-Dade County	4	
5.27	Map ability to integrate with street view services like Google Street View and other similar services retained by MDC	4	
5.28	Map ability to display MDC GIS provided point, line or polygon layer served through an MDC provided service (ArcGIS Server map service or ArcGIS online webmap)	4	
5.29	Map ability to display MDC GIS provided municipality layer throughout the visible map area at any zoom level	4	
5.30	Map ability to pan/zoom to select a location and reverse geocode to a property with or without address, to a street address or an intersection according to a county provided set of rules	4	
5.31	Map ability to collect and display additional GIS info whenever the selected location changes	4	
5.32	Map ability to collect and display additional property info whenever the selected location changes and is within property boundaries	4	
5.33	Map ability to send the selected location with all GIS data to the SR intake screen	4	
5.34	Map ability to update the selected location with all GIS data from the SR intake screen on any location change (e.g.	4	

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	existing SR loaded, address for new SR changed)		
5.35	Map and all other web-based Ui using GIS services are implemented using state-of-the-art ESRI JavaScript APIs for all GIS service consumption	4	
5.36	Ability to review a selected location before submitting SR by reopening the map	4	
5.37	Ability to change a selected location before submitting SR by reopening the map	4	
5.38	Ability to prevent SR creation dependent on SR configuration, location, MDC GIS feature layer data and a county provided rule set for each SR configuration	4	
5.39	Ability to prevent SR creation dependent on SR configuration and folio number availability as specified by the county for each SR configuration	4	
5.40	Allow address validation by intersection, exact location, common location, street, hundred-block, highways and validate with aliased street names	4	
5.41	Provide a notification when entered address is invalid	4	
5.42	Ability to add flag or alert on locations	4	
5.43	Map ability to display GIS features from SR configuration configured GIS feature layers, so that a precise feature location including identifier can be selected as problem location for SRs of such SR configuration (E.g. Using and selecting bus stops, as GIS feature for bus stop complaint SR configuration)	4	
5.44	All MDC GIS services and ESRI services must be consumed via REST endpoints		
#		**Proposer Response (0-4)**	**Explanation**
6.0	**INTEGRATION - MDC GIS - SR PROCESSING**		

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6.1	Ability to include GIS data that is stored with the SR in template configured emails with a map of location	4	
6.2	Ability to include GIS data that is stored with the SR in template configured sms/text messages	3	The data is already being stored in the system, based on the requirement of SMS/text message, we would need customization.
6.3	Ability to send any GIS data that is stored with the SR to configured department system interfaces	4	
6.4	Ability to auto-select county provided lists of email recipients dependent on GIS data that is stored with the SR	3	The data is already being stored in the system, based on the requirement, we would some configuration.
6.5	Ability to auto-select county provided lists of sms/text recipients dependent on GIS data that is stored with the SR	3	The data is already being stored in the system, based on the requirement, we would some configuration.
6.6	Ability to auto-assign a SR dependent on GIS data that is stored with the SR, SR configuration, and county provided rules	4	
6.7	Ability to trigger a workflow step when an SR is saved dependent on GIS data, SR configuration, and county provided rules	4	
#		**Proposer Response (0-4)**	**Explanation**
7.0	**INTEGRATION - MDC GIS - SELF-SERVICE**		
7.1	Ability to exclusively use MDC provided ESRI locators for geocoding of addresses and intersections	4	
7.2	Ability to exclusively use MDC provided ESRI locators for reverse geocoding	4	
7.3	Ability to consume ArcGIS Online and MDC Gis ESRI services	4	
7.4	Self-Service web UI and app are implemented using state-of-the-art ESRI JavaScript APIs for all GIS service consumption - not to be REST API	4	
7.5	Ability to geocode only to property addresses with folio number if the SR	4	

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	configuration is configured for mandatory folio number		
7.6	Ability to geocode to property addresses or street addresses dependent on SR configuration	4	
7.7	Ability to geocode to intersections when 2 streets are entered and the SR configuration allows intersections	4	
7.8	Ability to geocode to a condo unit if multi-family property and a unit number is entered	4	
7.9	Ability to store all addresses according to MDC GIS standards (USPS)	4	
7.10	Ability to store a folio number with each property address and each condo unit	4	
7.11	Ability to store a unit number and condo folio number with each multi-family property address	4	
7.12	Ability to store a folio number, municipality, and zip5 code for empty lots without address, selectable through reverse geocoding via map	4	
7.13	Ability to store a projected location x/y with each SR according to MDC GIS standards	4	
7.14	Ability to store a projected location x/y and address or intersection with each SR	4	
7.15	Ability to detect multi-family buildings based on MDC GIS provided data and select a unit number from all available units or the building	4	
7.16	Ability to display a map (Separate screen)	4	
7.17	Map ability to select a property, street address, or intersection through geocoding	4	
7.18	Map ability to select one geocoding match out of multiple candidates	4	
7.19	Map ability to display latest MDC GIS provided county imagery	4	

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7.20	Map ability to display latest MDC GIS provided street map layer	4	
7.21	Map ability to toggle between street map layer and county imagery	4	
7.22	Map ability to display MDC GIS provided parcel boundaries after a certain zoom level	4	
7.23	Map ability to pan/zoom to select a location and reverse geocode to a property with or without address, to a street address or an intersection according to a county provided set of rules	4	
7.24	Ability to prevent SR creation dependent on SR configuration, location, MDC GIS feature layer data and a county provided rule set for each SR configuration	4	
7.25	Ability to prevent SR creation dependent on SR configuration and folio number availability as specified by the county for each SR configuration	4	
7.26	Ability to pan/zoom the map to the user's device location on first map load and reverse geocode to a property, street, address, or intersection according to SR configuration and county provided rules	4	
7.27	Ability to pan/zoom the map to a county provided default location if the user's device is outside of Miami-Dade County after displaying a warning message	4	
7.28	Ability to prevent the user from panning to or selecting locations outside of Miami-Dade County and displaying a warning message on attempt	4	
7.29	Ability to limit minimum and maximum zoom levels as specified by the county	4	
7.30	Ability to review a selected location before submitting SR by opening the map	4	

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7.31	Ability to change a selected location before submitting SR by opening the map	4	
7.32	Map ability to display GIS features from SR configuration configured GIS feature layers, so that a precise feature location including identifier can be selected as problem location for SRs of such SR configuration (E.g. Using and selecting bus stops, as GIS feature for bus stop complaint SR configuration)	4	
#		**Proposer Response (0-4)**	**Explanation**
8.0	**INTEGRATION - MDC GIS - KNOWLEDGE BASE**		
8.1	Ability to automatically exclude articles from search results for municipalities that are not related to a selected address	3	Based on the current implementation of OpenText and Knowledgebase, customization is needed
8.2	Ability to share data for open data requirements	3	Based on the current implementation of OpenText and Knowledgebase, customization is needed
#		**Proposer Response (0-4)**	**Explanation**
9.0	**INTEGRATION - MDC GIS - REPORTING**		
9.1	Ability to load all SR data including at minimum 40 GIS data fields into one or more ESRI feature layers provided by the county	3	Report development is efforts will be needed
9.2	Ability to provide real-time (<1 min) updates on SR creation or change to a county provided Sql database table (EOC live reporting)	4	
#		**Proposer Response (0-4)**	**Explanation**
10.0	**INTEGRATION - MDC HOLIDAYS AND SOLID WASTE CALENDARS (MDC & City of Miami)**		
10.1	Ability to include a perpetual county holiday calendar in SR due date calculations	4	

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10.2	Ability to include a perpetual route-based MDC SW Recycling calendar for use in business rules that determine whether an SR can be created for a specific property at a specific time	2	Incapsulate 311 allow agent to select day for any schedulable SR. To make it "time" specific, it will need to be developed
10.3	Ability to include a perpetual route-based MDC SW Garbage calendar for use in business rules that determine whether an SR can be created for a specific property at a specific time	2	Incapsulate 311 allow agent to select day for any schedulable SR. To make it "time" specific, it will need to be developed
10.4	Ability to include a perpetual route-based City Of Miami SW Recycling calendar for use in business rules that determine whether an SR can be created for a specific property at a specific time	2	Incapsulate 311 allow agent to select day for any schedulable SR. To make it "time" specific, it will need to be developed
10.5	Ability to include a perpetual route-based City of Miami SW Garbage calendar for use in business rules that determine whether an SR can be created for a specific property at a specific time	2	Incapsulate 311 allow agent to select day for any schedulable SR. To make it "time" specific, it will need to be developed
#		**Proposer Response (0-4)**	**Explanation**
11.0	**INTEGRATION - MDC WASTE COLLECTION SYSTEM (WCS) or successor - INTAKE**		
11.1	Ability to query the Solid Waste Accounts and Billing system (SWABS) by property address, folio number, customer account number or another unique customer code (Below the acronym SWABS is used to denote the specifications for the Solid Waste Accounts and Billing system as well as a potential future successor)	4	
11.2	Ability to display query results including SWABS customer account information (8 fields), Bulky Pickups (8 fields each), Public service complaints and Enforcement Complaints	4	
11.3	Ability to retrieve and validate SWABS Customer account and owner information	4	

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11.4	Ability to automatically validate whether there is an existing open Service Request for (e.g. Bulky Trash SR, Green Waste Cart SR, Garbage Complaint SR or others)	4	
11.5	Ability to easily add new service request configurations	4	
#		**Proposer Response (0-4)**	**Explanation**
12.0	**INTEGRATION - MDC WASTE COLLECTION SYSTEM (WCS) or successor - SR PROCESSING**		
12.1	Ability to send SRs in real time directly to the SWM departmental SR resolution processing application via SOAP or REST interface on or after intake	4	
12.2	Ability to include the SWABS account number or other unique customer code when sending SRs to the department's SR resolution processing application	4	
12.3	Ability to include certain GIS data when sending SRs to department's SR resolution processing application	4	
12.4	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to the departments SR resolution processing application	4	
12.5	Ability to automatically delay, or que SR's for processing at a later time, if departmental resolution processing application is unavailable or system admin pauses	4	
12.6	Ability to receive and process an error message from Departmental SR resolution processing application by changing the SR status to interface error and emailing a notification to a configurable email list	4	

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12.7	Ability for users to correct an SR after an interface error and attempt resending SR to resolution processing application	4	
12.8	Ability to configure a delayed SR (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to the departmental resolution application to allow user to make corrections after initial intake	4	
12.9	Ability to change to SR status to lock or "Processing at department" or similar after the successful creation of an SR	4	
12.10	Ability to retrieve and associate work order numbers from CRM and Departmental SR processing application	4	
12.11	Ability to correlate CRM and SR Deparmental resolution processing work order numbers	4	
12.12	Ability to store and process work order numbers of 11 characters or more	4	
12.13	Ability to receive SR workflow updates from the SR departmental resolution processing application	4	
12.14	Ability to receive SR status updates (Close, open, cancel, void) from the departmental resolution processing application	4	
12.15	Ability to receive SR updates via fixed-width FTP provided file series	3	
12.16	Ability to receive SR updates via SOAP or REST interface provided by the system	4	
12.17	Ability to confirm to that an update was successfully applied to the a system	4	
12.18	Ability to respond that an update could not be applied to the system	4	
12.19	Ability to validate and work flow updates to the departmental SRs processing application	4	
12.20	Ability to add custom fields	4	

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#		Proposer Response (0-4)	Explanation
13.0	**INTEGRATION - MDC WASTE COLLECTION SYSTEM (WCS) or successor - SELF-SERVICE**		
13.1	Ability for constituents to submit a Bulky Trash request, which requires SWABS account query, displaying result and application of business rules prior to allowing submission	4	
13.2	Ability to display reason to constituent for not allowing submission of a request	4	
13.3	Ability to auto-approve Bulky Trash requests dependent on account data and constituent entered data partial match, allowing for typos, and other business rules	4	
13.4	Ability to send auto-approved Bulky Trash SRs to SWABS bypassing any SR configuration configured delay within a minute	4	
13.5	Ability to send emails/sms in real-time or on a predetermined schedule the use different message templates dependent on whether a request was auto-approved or requires manual approval	4	
13.6	Ability for constituents to submit a Garbage Missed report, which requires SWABS account query, Garbage calendar queries, Holiday calendar queries, displaying results and application of business rules prior to allowing submission	4	
13.7	Ability to quickly update the calendars at the change of each Fiscal and/or calendar year as well as before/during Emergency responses	4	
13.8	Ability to easily add new request types as the business process evolves	4	
#		Proposer Response (0-4)	Explanation

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14.0	**INTEGRATION - MDC PUBLIC WORKS SYSTEM (PWS) or successor**		
14.1	Ability to send SRs in real time to PWS (or successor) departmental SR resolution application system via database stored procedure call, SOAP, or REST API. (Below the acronym PWS is used to denote both the current PWS system as well as a potential successor departmental SR Resolution processing application)	4	
14.2	Ability to include certain GIS data when sending SRs to PWS; not limited to coordinates and location, zip, asset ID, district, etc.	4	
14.3	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to PWS - Departmental Resolution processing Application	4	
14.4	Ability to automatically delay, or que SR's for processing at a later time, if PWS, departmental resolution processing application is unavailable or system admin pauses interface without impact on intake	4	
14.5	Ability to receive and process an error message from PWS, Departmental SR resolution processing application by changing the SR status to interface error and emailing a notification to a configurable email list	4	
14.6	Ability for users to correct an SR after an interface error and attempt resending SR	4	
14.7	Ability to configure a delayed SR (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to PWS, the departmental resolution	4	

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	application to allow user to make corrections after initial intake		
14.8	Ability to process a PWS ok response by changing the SR status to "locked", "Processing at department" or similar and thereby preventing most user updates as specified by the county	4	
14.9	Ability to poll, PWS, departmental Resolution system for updates or new SRs every minute	4	
14.10	Ability to receive new PWS SRs from the PWS departmental resolution system	4	
14.11	Ability to receive new PWS SRs in status closed from the PWS departmental resolution system	4	
14.12	Ability to receive SR workflow updates from the PWS departmental resolution system	4	
14.13	Ability to receive SR location changes, address, intersection, corridor or area updates from the PWS departmental resolution system	4	
14.14	Ability to receive SR status updates (Close, open, cancel, void) from the PWS departmental resolution system	4	
14.15	Ability to receive SR question updates from the PWS departmental resolution system	4	
14.16	Ability to receive SR configuration change updates from the PWS departmental resoltion system	4	
14.17	Ability to receive SR participant change updates or additional SR participants from the PWS departmental resolution system	4	
14.18	Ability to confirm to PWS that an update or new SR was successfully applied to the system	4	

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14.19	Ability to respond to PWS that an update or new SR could not be applied to the system	4	
14.20	Ability to include a new SR identifier and other identifiers with a confirmation to PWS	4	
14.21	Ability to send certain allowed work flow updates to SRs occurring in the system to PWS	4	
#		**Proposer Response (0-4)**	**Explanation**
15.0	**INTEGRATION - MOSQUITO CONTROL SYSTEM (MCTRL)**		
15.1	Ability to send SRs in real time to MCTRL (or successor) departmental SR resolution application system via SOAP interface on or after intake	4	
15.2	Ability to include certain GIS data when sending SRs to MCTRL; not limited to coordinates and location, zip, district, etc.	4	
15.3	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to PWS - Departmental Resolution processing Application	4	
15.4	Ability to automatically delay, or queue SR's for processing at a later time, if MCTRL departmental resolution processing application is unavailable or system admin pauses interface without impact on intake	4	
15.5	Ability to receive and process an error message from MCTRL Departmental SR resolution processing application by changing the SR status to interface error and emailing a notification to a configurable email list	4	
15.6	Ability for users to correct an SR after an interface error and attempt resending SR	4	

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15.7	Ability to configure a delay (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to MCTRL, the departmental resolution application to allow user to make corrections after initial intake	4	
15.8	Ability to process a MCTRL ok response by changing the SR status to "locked", "Processing at department" or similar and thereby preventing most user updates as specified by the county	4	
15.9	Ability to receive MCTRL updates in realtime	4	
15.10	Ability to receive SR workflow updates from the MCTRL departmental resolution system	4	
15.11	Ability to receive SR status updates (Close, open, cancel, void) from the MCTRL departmental resolution system	4	
15.12	Ability to confirm to MCTRL that an update or new SR was successfully applied to the system	4	
15.13	Ability to respond to MCTRL that an update or new SR could not be applied to the system	4	
15.14	Ability to include a new SR identifier and other identifiers with a confirmation to MCTRL	4	
15.15	Ability to send certain allowed work flow updates to SRs occurring in the system to MCTRL	4	
#		**Proposer Response (0-4)**	**Explanation**
16.0	**INTEGRATION - MDC RER CASE MANAGEMENT SYSTEM (CMS) or successor**		
16.1	Ability to send SRs of at minimum 63 SR configurations that are configured to interface with the Regulatory and Economic Resources department's case	4	

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	management system (CMS) to CMS via database stored procedure call, SOAP or REST interface on or after intake (Below the acronym CMS is used to denote both the current CMS system as well as a potential successor)		
16.2	Ability to include certain GIS data when sending SRs to CMS	4	
16.3	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to CMS	4	
16.4	Ability to process a CMS error response after sending by changing the SR status to interface error and emailing a notification to a configurable email list	4	
16.5	Ability for users to correct an SR after an interface error and attempt resending SR	4	
16.6	Ability to configure a delay (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to CMS to allow user to make corrections after initial intake	4	
16.7	Ability to process a CMS ok response by changing the SR status to "locked", "Processing at department" or similar and thereby preventing most user updates as specified by the county	4	
16.8	Ability to poll for CMS updates or new SRs sent from CMS every minute	4	
16.9	Ability to receive new CMS SRs from the CMS departmental system	4	
16.10	Ability to receive new CMS SRs in status closed from the CMS departmental system	4	
16.11	Ability to receive SR workflow updates from the CMS departmental system	4	
16.12	Ability to receive SR location changes, address, intersection, corridor or area	4	

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	updates from the CMS departmental system		
16.13	Ability to receive SR status updates (Close, open, cancel, void) from the CMS departmental system	4	
16.14	Ability to receive SR question updates from the CMS departmental system	4	
16.15	Ability to receive SR configuration change updates from the CMS departmental system	4	
16.16	Ability to receive SR participant change updates or additional SR participants from the CMS departmental system	4	
16.17	Ability to confirm to CMS that an update or new SR was successfully applied to the system	4	
16.18	Ability to respond to CMS that an update or new SR could not be applied to the system	4	
16.19	Ability to include a new SR identifier and other identifiers with a confirmation to CMS	4	
16.20	Ability to send certain allowed work flow updates to SRs occurring in the system to CMS	4	
#		**Proposer Response (0-4)**	**Explanation**
17.0	**INTEGRATION - MDC TRANSIT BUS STOP MANAGEMENT SYSTEM (TBST)**		
17.1	(Below the acronym TBST is used to denote both the current TBST system as well as a potential successor departmental SR Resolution processing application) Ability to send SRs in real time directly to the TBST departmental SR resolution processing application via SOAP or REST interface on or after intake	4	
17.2	Ability to include certain GIS data when sending SRs to TBST	4	

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17.3	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to TBST	4	
17.4	Ability to process a TBST error response after sending by changing the SR status to interface error and emailing a notification to a configurable email list	4	
17.5	Ability for users to correct an SR after an interface error and attempt resending SR to TBST	4	
17.6	Ability to configure a delay (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to TBST to allow user to make corrections after initial intake	4	
17.7	Ability to process a TBST ok response by changing the SR status to "locked", "Processing at department" or similar and thereby preventing most user updates as specified by the county	4	
17.8	Ability to receive TBST updates in realtime	4	
17.9	Ability to receive SR workflow updates from the TBST departmental resolution system	4	
17.10	Ability to receive SR location changes and address updates from the TBST departmental resolution system	4	
17.11	Ability to receive SR status updates (Close, open, cancel, void) from the TBST departmental system	4	
17.12	Ability to confirm to TBST that an update was successfully applied to the system	4	
17.13	Ability to respond to TBST that an update could not be applied to the system	4	
17.14	Ability to send certain allowed work flow updates to SRs occurring in the system to TBST	4	
#		**Proposer Response (0-4)**	**Explanation**

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18.0	**INTEGRATION - CITY OF MIAMI CITIVIEW SYSTEM (CV) or successor**		
18.1	Ability to send SRs of at minimum 22 SR configurations that are configured to interface with the City of Miami's CitiView system (CV) or it's successor via database stored procedure call, SOAP or REST interface on or after intake (Below the acronym CV is used to denote both the current CV system as well as a potential successor)	4	
18.2	Ability to include certain GIS data when sending SRs to CV	4	
18.3	Ability to include SR attachments, such as images, video, recorded sound, or other documents when sending SRs to CV	4	
18.4	Ability to automatically delay (queuing) of CV interface SRs if CV is unavailable or a SysAdmin pauses this interface without impact on intake	4	
18.5	Ability to process a CV error response after sending by changing the SR status to interface error and emailing a notification to a configurable email list	4	
18.6	Ability for users to correct an SR after an interface error and attempt resending SR	4	
18.7	Ability to configure a delay (e.g. 10-20mins) for each SR configuration before the system attempts sending the SR to CV to allow user to make corrections after initial intake	4	
18.8	Ability to process a CV ok response by changing the SR status to "locked", "Processing at department" or similar and thereby preventing most user updates as specified by the county	4	

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18.9	Ability to poll for CV updates or new SRs sent from CV every minute	4	
18.10	Ability to receive new CV SRs from the CV departmental system	4	
18.11	Ability to receive new CV SRs in status closed from the CV City of Miami system	4	
18.12	Ability to receive SR workflow updates from the CV system	4	
18.13	Ability to receive SR location changes, address, intersection, corridor or area updates from the CV system	4	
18.14	Ability to receive SR status updates (Close, open, cancel, void) from the CV system	4	
18.15	Ability to receive SR question updates from the CV system	4	
18.16	Ability to receive SR configuration change updates from the CV system	4	
18.17	Ability to receive SR participant change updates or additional SR participants from CV	4	
18.18	Ability to confirm to CV that an update or new SR was successfully applied to the system	4	
18.19	Ability to respond to CV that an update or new SR could not be applied to the system	4	
18.20	Ability to include a new SR identifier and other identifiers with a confirmation to CV	4	
18.21	Ability to send certain allowed work flow updates to SRs occurring in the system to CV	4	
#		**Proposer Response (0-4)**	**Explanation**
19.0	**INTEGRATION - MDC ANIMAL SERVICES SYSTEM (Chameleon) or successor**		
19.1	Ability for certain authorized user groups to query Chameleon or its successor for records by multiple criteria (Last name,	4	

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	first name, tag, address) through SQL query, SOAP or REST interface and display results		
19.2	Ability to display multiple records as table for selection	4	
19.3	Ability to display single or selected record (at minimum12 fields)	4	
19.4	Ability to copy a single record to an SR including tag number, tag expiration, animal name, animal type, as well as owner information such as last name, first name, phone numbers, and address	4	
#		**Proposer Response (0-4)**	**Explanation**
20.0	**INTEGRATION - MDC ELECTIONS SYSTEM**		
20.1	Ability for certain authorized user groups to query the elections system or its successor for records by multiple criteria (Last name, first name, date of birth, SSN, FVRSID, certificate number) through SQL query, SOAP or REST interface and display results	4	
21.2	Ability to display multiple records as table for selection	4	
21.3	Ability to display single or selected voter registration record (at minimum 20 fields) and voter history	4	

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EXHIBIT C – SECURITY MATRIX

Functionality		Meet (Y/N/C)	Module / Detailed Explanation
1	Solution uniquely identifies each user.	Y	The following is the flow of how Salesforce authentication works. • The user enters credential over TLS, or the user is redirected to an external identity provider for federated authentication. • Password policies are checked. • Identity Confirmation is checked if required by policy, or SAML authentication. • Login Profile Restrictions are checked. • Salesforce authenticates using credential or delegated authentication. • A unique, non-predictable session token is issued. • All subsequent requests carry the session token. • Session token maps to user context, generated from: userID, orgID, Client Hash Value set, orgID, userID, sessionID
2	Solution provides integration with Microsoft Active Directory or Azure Active Directory for user authentication of Internal users. (ADFS, FIM, MIM)	Y	Logon is form-based. When users log into the Salesforce application, they submit a username and password, which are sent to Salesforce via an TLS-encrypted session. Security features are developed by Salesforce and built into the application. Third-party packages are not used for development or implementation of security internal to the application. In addition, single sign-on and two-factor authentication may be used to authenticate users for both standard users and Community users. Some organizations prefer to use an existing single sign-on capability to simplify and standardize their user authentication. You have two options to implement single sign-on—federated authentication using Security Assertion Markup Language (SAML) or delegated authentication. Federated authentication using SAML allows you to send authentication and authorization data between affiliated but unrelated Web services. This enables you to sign-on to Salesforce from a client application. Federated authentication using SAML is enabled by default for the County. Delegated authentication single sign-on enables you to integrate Salesforce with an authentication method that you choose. This enables you to integrate authentication with your LDAP (Lightweight Directory Access Protocol) server or perform single sign-on by authenticating using a token instead of a password. You manage delegated authentication at the profile level, allowing some users to use delegated authentication, while other users continue to use their Salesforce-managed password. Delegated authentication is set by profile, not organization wide. You

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			must request that this feature be enabled by Salesforce. Salesforce can be configured to utilize Active Directory directly via Delegated Authentication, or indirectly via Federated Identity using either SAML 1.1, or SAML 2.0. Additionally your users can be loaded from information drawn from your Active Directory servers and modifications made in Active Directory can be propagated into Salesforce. Customers can use their own SAML Identity Provider, or license one directly from Salesforce with our Identity Connect product.
3	Solution can be installed and maintained in accordance to the Microsoft Active Directory administrative tier model. https://docs.microsoft.com/en-us/windows-server/identity/securing-privileged-access/securing-privileged-access-reference-material	Y	This does not apply to Salesforce because it is a multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the County to manage your mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE, Edge). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices. As long as the user can access a supported browser to log into the Salesforce site they will not require local administrator rights to run the application.
4	Solution can be installed and maintained in accordance to the principle of least privilege for all Operating Systems including Windows/LINUX/UNIX/AIX systems.	Y	This does not apply to Salesforce because it is a multi-tenant, cloud-based web application.
5	Solution can be installed and maintained in accordance to the principle of least privilege for Database systems.	Y	This does not apply to Salesforce because it is a multi-tenant, cloud-based web application.
6	Solution uniquely identifies each process (system, service) account.	Y	
7	Solution supports scheduled password rotation of process (system, service) accounts.	Y	
8	Default accounts are either disabled or capable of being renamed. (e.g. administrator/admin, guest)	Y	

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9	Accounts are automatically disabled after a configurable period of inactivity (e.g. 90 days).	Y	
10	Solution utilizes account passwords for authentication.	Y	By default, logon is form-based. When users log into the Salesforce application, they submit a username and password which are sent to Salesforce via an TLS-encrypted session.
11	Account password complexity is configurable to allow for a minimum of 12 characters comprised of upper and lower alpha, numeric and special characters (e.g. !, @, #, $, %, &, *)	Y	Minimum password length may be set to 5 to 50 characters. The County's administrator can set password complexity requirements as noted below: • Must mix alpha and numeric characters • Must mix alpha, numeric and special characters • Must mix numbers and uppercase and lowercase letters • Must mix numbers, uppercase and lowercase letters, and special characters
12	Passwords are suppressed (not echoed back) when entered by users.	Y	Salesforce masks passwords.
13	Solution supports Multi-Factor Authentication (MFA)	Y	All Salesforce user interface authentication methods, including username and password, certificate-based authentication, delegated authentication, SAML single sign-on, and social sign-on through a third-party authentication provider, are supported. Your organization can apply the two-factor authentication requirement to users in Salesforce orgs and communities. Salesforce Authenticator is a free mobile app your users download from the App Store for iOS or Google Play for Android. Users can connect the app to their Salesforce account on the Advanced User Details page of their personal settings. Or, if you set a two-factor authentication requirement in your org, users who don't already use a mobile authenticator app are prompted to connect the account during login. After users connect the app to their account, they use it whenever Salesforce has to verify their identity, such as when they log in from a device Salesforce doesn't recognize. They also use the app whenever your org policies require users to use two-factor authentication for logging in, accessing reports or dashboards, or accessing connected apps. If a user loses access to the app, such as when replacing or losing a mobile device, disconnect the app from the user's account. Then the user can connect a new installation of the app on a different mobile device. You can disconnect the app from the account on that user's

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			Advanced User Detail page. For device activation and two-factor authentication, users who have the app connected to their account are first challenged to verify their identity using the app. If other identity verification methods, such as a code generated by an authenticator app or sent via SMS to the user's verified mobile phone, are available, users can sometimes choose another method. The mobile app also alerts users of logins and other account activities that require identity verification. Users verify the activity by responding on their mobile device. Salesforce Authenticator syncs backups when a user adds or removes an account, turns backups on or off, or changes a passcode. If the backups are out of date, we notify you. We want you to be able to recover your accounts. If you had just added an account or changed an existing one and backups hadn't yet finished syncing, Salesforce Authenticator tries longer to sync your backup before bothering you with an out-of-date notification. When your users log in to Salesforce from a device or browser we don't recognize, they are prompted to verify identity, even if they log in from an IP address Salesforce has seen before. Your organization can specify a range of trusted IP addresses from which profile users can log in without being prompted to verify their identity. You can also specify a range of IP addresses from which all your users can log in without being prompted to verify their identity. For more information please see: https://help.salesforce.com/HTViewHelpDoc?id=activating_computer.htm and https://help.salesforce.com/articleView?id=admin_loginrestrict.htm&type=5.
14	User login credentials (user account/password) are encrypted in transmission with a minimum of AES 256 bit encryption	Y	Passwords are hashed with a per-user salt, using PBKDF2. Salesforce employees do not have access to customer's user's passwords.
15	Solution supports password history functionality whereby password re-use is prohibited for a configurable number of prior passwords of at least 10.	Y	To reduce password reuse and better protect your Salesforce org from improper access, enforce password history. Administrators can select up to 24 passwords to be remembered in the org history (the default is 3 passwords remembered). Password history is not saved until you set this value.
16	Solution supports administrative passwords aging of 30 days.	Y	Password expiration can be set for 30, 60, 90, 180 days, 1 year, or Never.

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17	Administrative accounts have the capability of resetting passwords	Y	The County's Salesforce administrator can reset a user's password for better protection or to unlock a user if the user is locked out. An administrator may click the 'Reset Password' button on the user's record, which will generate a temporary password for the user to use without the use of the validation question. A password created this way does not expire, but users must change the password the first time they log in. Only an administrator can reset single sign-on user passwords. Single sign-on users cannot reset their own passwords.
18	Solution provides user self-service password reset functionality utilizing a challenge and response authentication	Y	When a user loses a password, the user can click the forgot password link on the login page to receive an email with steps to reset a password. The user must correctly answer the security question to reset the password. In Password Policies, you can customize the security question page that the user sees with information about where to go to for help. If the user hasn't set a security question, or does not answer the security question correctly, the password isn't reset. A user can request to reset a password through the forgot password link a maximum of five times in a 24-hour period. Resetting a password also resets the user's security token.
19	Solution includes self-service challenge and response that are comprised of 8 challenge questions and stores user's responses during registration. Responses must be stored with a minimum of AES 256 bit encryption.	Y	
20	Solution includes self-service password reset that presents user with a configurable number of random challenge questions which when answered correctly will enable the password to be reset.	Y	
21	Solution supports the ability to limit unsuccessful login attempts to 5. If the number of unsuccessful login attempts is exceeded, system locks out or disables user account.	Y	The County can set the number of invalid login attempts before a user is locked out, along with the lockout period.
22	Solution supports limiting concurrent user sessions to 1 by default, and the number of concurrent	Y	Salesforce out of the box, the application allows concurrent logins. Browser sessions can be limited by IP range and sessions can be locked to the IP address from which they originated. Mobile clients cannot be restricted

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	user sessions is configurable by administrators.		by IP but can be restricted by device. The login history is available for 6 months for audit. A login flow provides the ability to build custom business processes and invoke them as users log in. This lets you integrate a custom process with the Salesforce authentication engine, as well as the ability for users to participate in the authentication decision process during the login process. Administrators can create multiple flows and associate each one with a different user profile. So organizations can have one group of people going through one business process as they log in, and another group going through another business process as they log in. Once you associate a login flow with a profile, it automatically applies to every UI login for that profile that exists on the platform. Login flows work with all types of authentication that are supported on the platform; not only the standard username and password authentication, but also single sign-on.
23	Solution provides administrative capability to lock or disable accounts whenever necessary.	Y	Salesforce lets you deactivate users, but not delete them outright. The reason is because a user can own accounts, leads, and groups, and can be on multiple teams. Removing a user from Salesforce affects many processes in the org. After departure from the org, we don't want the user to retain access to their account. But merely deleting a user can result in orphaned records and the loss of critical business information. For these reasons, deactivating rather than deleting the user is the appropriate action to take. Deactivation removes the user's login access, but it preserves all historical activity and records, making it easy to transfer ownership to other users. For situations where changing ownership to other uses must be done before deactivation, freezing the user prevents login to the org and access to the user's accounts. In some cases, you can't immediately deactivate an account, such as when a user is selected in a custom hierarchy field. To prevent users from logging in to your organization while you perform the steps to deactivate them, you can freeze user accounts.
24	Solution supports the display of a configurable warning, pre-login banner during solution login indicating that unauthorized access is prohibited.	Y	
25	Solution supports the	Y	Salesforce enables administrators to create and manage

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	ability to manage users based on group membership. (role based privileges) in addition to assigning/revoking specific user based privileges		new roles, as well as ensure that changes to roles do not affect parent roles. The user interface allows the administrator to create an appropriate hierarchy that establishes the parent to child hierarchy. This hierarchy allows you to control how users see and access data. It also impacts how the roles above them see objects based on profile/hierarchy combinations. Structurally the role hierarchy and permissions are performed in 2 separate locations. You can leave the hierarchy in place but change the profile permissions. This can have an impact on what is seen above especially if you locked down access. In short the role hierarchy, profiles and permission sets are the starting point to manage who sees what in the data. **Group Access Control** Salesforce enables administrators to control the access level (read only, read/write, etc.) any group has to accounts, contacts and cases. Group access does not default to "owner" level (full access for all objects). The administrator can set the default sharing mode to private, public read only, public read/write. You can then define sharing rules that open up access to records by users and groups. Delegated administrators can also create public groups, and you can specify public groups in which delegated administrators can add and remove users in specified roles and all subordinate roles. This way, the County can delegate public group management tasks while maintaining strict control over which public groups delegated administrators can manage. For example, you might have a custom object for performance reviews whose organization-wide default is set to Private. After deselecting the Grant Access Using Hierarchies checkbox, only the employee who owns the review record can view and edit it. To share the reviews up the management chain, administrators can create a sharing rule that shares to a user's Managers Group. Alternatively, the employee can share the review record with the user's Managers Group by using manual sharing.
26	Solution provides tools and reporting to enumerate user rights/privileges, group membership, access to locations/functions or user profiles	Y	Salesforce enables administrators to manage roles and relationships between roles from within the application, in a single easy to read page depicting the role hierarchy. The defined role hierarchy can be displayed in Tree View, Sorted List view or List View. Administrators can easily add new roles or sub-roles to the organization.
27	Solution provides audit logging capability which captures successful logins, unsuccessful logins, records viewed,	Y	**Core Auditing Capabilities** Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that

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	printed, added, deleted or modified and has the capability to retain logs for a period of 5 years plus current.		provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include: • Record Modification Fields - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information. • Field History Tracking - Enable auditing for individual fields (up to 20 fields per object), which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing. • Login History - Review up to 20,000 successful and failed login attempts to your organization for the past six months. The County can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary. • Identity Verification History - Review up to 20,000 records of your org users' identity verification attempts from the past six months. For example, suppose that two-factor authentication is enabled when a user logs in. When the user successfully provides a time-based, one-time password as proof of identity, that information is recorded in Identity Verification History. • Setup Audit Trail - Administrators can view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to the County's configuration. While the Login History and Setup Audit Trail are available for six months within Salesforce, they can be downloaded and stored locally to meet longer audit log retention requirements. Customers may also integrate the application logs with their organizational SIEM implementation. **Event Monitoring (Additional License Option)** In addition to Salesforce's core auditing capabilities, Salesforce offers Event Monitoring as an additional license option. The County can use event monitoring to discover how often and at what times your users are logging into and out of your organization. This includes insight into what Salesforce applications are being

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			adopted by users, who is logging in and from where, what pages users are viewing, what knowledge articles users are viewing, what reports users are running and exporting, which search terms users are using and what individual users click, and other aspects of application usage. This capability helps you discriminate between valid and invalid login requests and also track user login patterns for future reference. For example, depending on your org settings, admins can log into Salesforce as another user. You can use Login As event type data to review those actions to identify any security breaches or vulnerabilities, and also to inform your users what occurred. Not only can the County better understand how your apps are being utilized, but you can also monitor if users download large amounts of data that might put your organization at risk. The County can also determine if an employee is unnecessarily downloading sensitive customer information, pinpointing the exact time and location of that event. Event Monitoring is delivered as an API-first feature and there are Salesforce partners with visualization tools available. Use the SOAP API and REST API resources to retrieve event log files that contain information useful for assessing organizational usage trends and user behavior. Because event log files are accessed through the Salesforce Platform SOAP API and REST API, you can integrate log data with your own back-end storage and data marts so that you can correlate data from multiple organizations and across disparate systems easily. When using event monitoring, keep the following in mind: • Log data can be deleted by your Salesforce administrator. You can't insert or update log data. • Use the EventType field to determine which files were generated for the County. • An event generates log data in real time. However, log files are generated the day after an event takes place, during non-peak hours. Therefore, daily log file data is unavailable for at least one day after an event. For hourly log files, depending on event delivery and final processing time, an event is expected to take three to six hours from the time of the event to be available in the log file. However, it can take longer. • Log files, represented by the EventType field, are only generated if there is at least one event of that type for the day or hour. If no events took place, the file isn't generated. • Log files are available based on CreatedDate for the last 30 days when organizations purchase User Event Monitoring • All event monitoring logs are exposed to the API through the EventLogFile object. However, there is no access through the user interface, except through the Event Monitoring Analytics app.

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			• Hourly event log files are provided for you to review events in your orgs on an accelerated basis. However, it's possible that you don't get all event log data in hourly event log files, especially during site switches, instance refreshes, or unplanned system outages. For complete data, use the daily log files. Event monitoring can be used with 49 different event types. For more information please see: https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_eventlogfile_supportedeventtypes.htm. *Real-Time Event Monitoring* With the Real-Time Event Monitoring feature, you can stream and store event data and create transaction security policies for several new events in Salesforce, all in real time. When you enable Real-Time Event Monitoring, you automatically get Enhanced Transaction Security—Salesforce's latest and greatest feature for creating transaction security policies. Use Event Manager to view and monitor events in your org. For more information, please see: https://help.salesforce.com/articleView?id=real_time_event_monitoring_overview.htm. *Enhanced Transaction Security* Enhanced Transaction Security policies give your organization the ability to take real-time security actions based on event triggers. With Enhanced Transaction Security, you can monitor events according to the policies that you establish. When a policy is triggered, you can receive a notification and/or take an action. For example, suppose that you activate a policy to limit the number of concurrent sessions per user to three. A user with three login sessions tries to create a fourth session. The County can require a user to end one of their existing sessions before proceeding with the new session. At the same time, you are notified that the policy was triggered. For more information, please see: https://help.salesforce.com/articleView?id=enhanced_transaction_security_policy_types.htm. *Event Monitoring Analytics App* The County can use the built-in Event Monitoring Analytics App to explore your monitoring data in Salesforce. The Event Monitoring Analytics App integrates with Event Monitoring and Setup Audit Trail data to give you insights into your user and org behavior. App creation is easy and with its pre-built dashboards and datasets, you can start exploring right away. This app helps you drill into your org's data and swiftly identify suspicious behavior, slow page performance, and poor

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			user adoption. Get valuable information instantly from your Salesforce event logs, such as the number of people and IP addresses accessing your org, which Visualforce requests are timing out, and which users make changes in Setup. The County can detect performance problems early, such as queries taking too much time, by getting notifications when a KPI value exceeds your established threshold. Hourly event log file integration with the Event Monitoring Analytics app is unavailable. Data is refreshed once a day in the app. For more information, please see: https://help.salesforce.com/articleView?id=bi_app_admin_wave.htm. **Field Audit Trail (Additional License Option)** Organizations desire certainty that their data is accurate, complete and reliable, enabling them to meet stringent industry regulations. With the addition of Field Audit Trail, the County's ability to track changes at the field level increases from 20 fields to 60 fields per object and log availability increases from 18 months to 10 years. The County can also set different policies for each Salesforce object to ensure data is purged when no longer needed. For more information, please see https://help.salesforce.com/articleView?id=field_audit_trail.htm.
28	Solution audit logs captures date and time, user account, source IP address, audit event and success or failure of event	Y	Please see our response to item 27 above.
29	Solution prohibits administrators from disabling the audit mechanism.	Y	Infrastructure logs are collected and stored in a log management system that is managed by the Salesforce Security organization. Users of this system do not have the ability to modify or delete log data. Administrative access to this environment is limited to a small number of authorized individuals within the Security organization.
30	Solution ensures the audit log is protected from unauthorized access. (i.e. logs are capable of simultaneously being sent to a logging server or SIEM in addition to being maintained locally)	Y	
31	Solution prevents users or administrators from editing the audit log. (modifying, deleting or adding log entries)	Y	
32	Solution provides for software version controls	Y	All Salesforce core platform users are always on the latest version of our platform because everyone gets instant

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	to prevent outdated versions of software access to DBMS.		upgrades. Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team.
33	Solution generates outbound alerts and notifications. Explain what data is contained in said messages (e.g. email alerts, automated reports, SMNP traps).	Y	Salesforce enables organizations to deliver proactive alerts (including on email-enabled devices and push notifications from the Salesforce mobile application) to key executives/managers, group members, or any users of the application. With Lightning Experience, users can stay on top of all new alerts or notifications from the notifications tray, and task icons displayed in the page. Notifications alert users when key events occur in Salesforce that they should know about or that require their attention — such as when they receive approval requests or are mentioned in Chatter posts. A number displays on the notifications icon in the header that denotes how many notifications the user hasn't yet seen and resets to zero when the user opens the list. To read a notification's details, users simply click on it. Unread notifications in the list display with a darker background, to help distinguish them from those that have been read already. Users can mark all notifications as read by clicking on the "Mark all as read" link. A notifications card, on the other hand open in the notifications tray. The user can see up to three notification cards at one time. More cards appear when a user clicks a card to go to the task or clicks the X to dismiss the notification. The reminder remains in the notifications tray.
34	If Solution's database is relational, referential integrity is enforced by the RDBMS	Y	Within the County's organization, the administrator and project sponsor are responsible for monitoring proper data entry. Using pick list fields extensively in the application helps to minimize poor data entry. The Salesforce application is built on a relational database. Relational databases help ensure the integrity of the data model. In addition, field validations and the application itself help ensure data integrity. Salesforce offers many features to ensure the capture of effective and relevant customer data. The system offers features such as validation rules with red-highlighted error messages, administrator-defined field picklists, field default values, required fields, and bubble help text on data entry screens. Additionally, we provide field history tracking that records all field changes, with user, date and changed value, for selected tracking fields. Refer to this Help & Training article for additional information on Validation Rules: https://help.salesforce.com/apex/HTViewHelpDoc?id=fields_defining_field_validation_rules.htm&language=en Salesforce primary systems are developed exclusively in Java. Other components use Oracle's procedural

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			language for SQL - PL/SQL. The following is a list of core software products supporting the system: • Jetty Application and HTTP Servers • Java • Oracle RDBMS RAC • Solaris • RedHat Linux • Lucene Search Engine • Oracle NetBackup Software Salesforce also uses a variety of tools to monitor performance. Salesforce does not require a platform to run on. Salesforce solutions are delivered on-demand over the Internet, so you need not worry about licensing software and setting up and managing hardware platforms, operating systems, or relational database management systems (RDBMSs).
35	Solution prohibits users, developers, data base administrators or system administrators from making changes to posted, completed or closed transaction records.	Y	
36	Solution provides rollback processes incorporated into the database for all critical transactions	Y	You have the option to keep your code and metadata under version control and deploy a previous revision to your org. Please note that this does not constitute a full rollback. New metadata components that were introduced in the revision that has since been rolled back will not automatically get deleted. **Tableau CRM** Tableau CRM maintains previous versions of datasets. In the event of unforeseen errors, you can roll back to a previous version of a dataset. To restore a dataset, go to its edit page and click Restore Dataset. You can choose from the previous two versions. Select the one you want and click Restore. If you have older versions of the dataset, click the Show Older Versions link. You can select older versions, but Analytics can't always restore them. Analytics runs the restore as a data job, which you can track on the Monitor tab of the data manager.
37	Solution ensures that sensitive data (data that falls under the scope of **FSS 539.003,** CJIS, PII, SOX, HIPAA, and PCI requirements) is encrypted during transmission over the client's network (minimum	Y	Salesforce solutions are not currently CJIS compliant and therefore the storage, processing, or transmission of CJI data is not supported at this time as Salesforce has not been assessed against the CJIS framework. Salesforce offers layers of security across the infrastructure, network and application services that can protect sensitive data. For information on Salesforce encryption capabilities, please see our response to item 45 below.

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	AES 256-bit encryption)		
38	Solution ensures that sensitive information (data that falls under the scope of **FSS 539.003**, CJIS, PII, SOX, HIPAA, and PCI) which is vulnerable to unauthorized access, encrypted while in storage (minimum AES 256-bit encryption)	Y	Salesforce solutions are not currently CJIS compliant and therefore the storage, processing, or transmission of CJI data is not supported at this time as Salesforce has not been assessed against the CJIS framework. Salesforce offers layers of security across the infrastructure, network and application services that can protect sensitive data. For information on Salesforce encryption capabilities, please see our response to item 45 below.
39	Solution ensures that Is sensitive information (data that falls under the scope of **FSS 539.003,** CJIS, PII, SOX, HIPAA and PCI) encrypted for transmission over external networks or connections. (minimum AES 256-bit encryption)	Y	Salesforce solutions are not currently CJIS compliant and therefore the storage, processing, or transmission of CJI data is not supported at this time as Salesforce has not been assessed against the CJIS framework. Salesforce offers layers of security across the infrastructure, network and application services that can protect sensitive data. For information on Salesforce encryption capabilities, please see our response to item 45 below.
40	If Cloud Hosted or Proposer Hosted, Solution is hosted in an audited data center complying with ISO 27001, SAS 70, SSAE 16 or SOC2 or3 audit standards. (please provide copy of most recent audit)	Y	Salesforce has established and maintains a formal, documented, mandated, company-wide information security program under the framework of ISO 27001, including security policies, standards and procedures. The Salesforce Services are ISO 27001 certified and PCI-DSS compliant. SOC1, SOC2 and SOC3 audits are performed by a third-party auditor annually at a minimum. Additional audits and certifications include: • HITRUST Certificate • ASIP Santé HDS Certificate (France) • ASP/SaaS Certificate (Japan) • iRAP (Australia) More information is available at https://compliance.salesforce.com/.
41	If Cloud Hosted or Proposer Hosted, Solutions has controls in place which prohibit Hosting or Solution's employees or 3rd party vendor technical support personnel access to or the ability to access, view or modify customer confidential data in compliance with **FSS 536.003**. Please describe controls used to ensure data confidentiality, including encryption and	Y	To protect against access through the application, Salesforce employees don't have access at the application level for any of its customers. To protect against access through the application, Salesforce employees don't have access at the application level for any customers, unless the customer grants access through the "login as" feature. Salesforce can provide contractual assurance to its customers that the data hosted in the Salesforce Services will be kept confidential and not accessed by Salesforce employees except as necessary to provide the services. Permitted access to the production environment infrastructure is restricted to a very limited number of full-time Salesforce employees required to manage the

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	key storage mechanisms.		service. These Salesforce employees do not have login access to customer's instances (org), and because of Salesforce's multi-tenant infrastructure, they do not see customer data in an assembled manner. For information on encryption, please see item **45** below.
42	If Cloud Hosted or Proposer Hosted, Solution provides either active-active or active-passive failover between geographically diverse data centers	Y	Each Salesforce instance is built and maintained in two geographically separate locations. An instance is actively served from one location (the active site) with transactions replicating in near real-time to the other completely redundant location (the ready site). This infrastructure model allows us to switch the location of the active site for maintenance, compliance, and disaster recovery purposes, which is referred to as a site switch. Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the active data center, and then cloned at a ready data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.
43	If Cloud Hosted or Proposer Hosted, Solution, data is physically located within the Continental United States.	Y	Depending on the Salesforce services the County implements, Salesforce can establish the County's instance within the Continental United States.
44	If Cloud Hosted or Proposer Hosted , Solution is accessible from the County network and Proxy infrastructure	Y	The Salesforce application can be configured to work with a variety of implementation models. As Salesforce is a web based cloud application, it does not require a proxy to be implemented on the customer egress to perform in a secure manner. This is an implementation decision by the customer that can be used to control customer network web traffic to better control their data and web traffic flow. We would recommend and can work to integrate a solution that best meets the customer needs and security requirements.
45	If Cloud Hosted or Proposer Hosted, Solution encrypts all sessions from initiation to termination using validated encryption ciphers (TLS 1.2 or higher)	Y	**Encryption Capabilities** Salesforce has many customers that are subject to laws pertaining to the processing of personally identifiable information (PII) or personal data. Salesforce offers its customers a broad spectrum of functionalities and customer-controlled security features that its customers may implement in their respective uses of the Salesforce services. Salesforce believes that these provide its customers the flexibility to comply with laws with stringent privacy and security requirements.

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			Data In Motion All transmissions between the user and the Salesforce Services are TLS 1.2 encrypted with a 2048-bit Public Key, using AES 256-bit encryption by default. *Data At Rest* Salesforce Classic Encryption includes a feature to encrypt custom text fields (ECF): • The fields can be masked appropriately for specific data types (i.e., credit card number, Social Security Number, National Insurance Number, Social Insurance Number). • Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default. • Customers can manage their encryption key based on their organization's security needs and regulatory requirements. See our Help and Training site for details: https://help.salesforce.com/apex/HTViewHelpDoc?id=security_keys_using_master.htm&language=en • Encrypted fields use 128-bit encryption and the AES (Advanced Encryption Standard) algorithm • Custom text fields can be up to 175 characters in length Data in motion is network-based encryption, using the certificates and ciphers described in the general description of this control. Data at rest is database-based field-level encryption. More information on the encryption standards and their implementation can be referenced within the System Security Plan (Available upon Request) or the Salesforce Security Guide, located: https://resources.docs.salesforce.com/226/latest/en-us/sfdc/pdf/salesforce_security_impl_guide.pdf. *Additional Salesforce Encryption Capabilities* Apex Code extends the powerful and proven success of the Salesforce Platform by introducing the ability to write code that runs on Salesforce servers. This language makes possible the development of a new class of application and features deployed entirely on demand. Using Apex, the County can create user interface classes that utilize the Apex crypto class to encrypt field level data up to AES 256-bit encryption. Please see here for more information: https://developer.salesforce.com/page/Apex_Crypto_Class **Salesforce Platform Encryption (Additional Licensing Option)** Salesforce Classic Encryption is limited to encrypting custom text fields of 175 characters or less, while

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			Salesforce offers Salesforce Platform Encryption as an additional licensing option for encrypting standard and custom fields of various types, attachments, files, and other content using AES 256-bit encryption. Salesforce Platform Encryption sets up in minutes, with no additional hardware or software, and uses native strong, standards-based encryption. Platform Encryption provides an extra layer to Salesforce's security while enabling customers to enjoy business critical Platform features, such as search, workflow, and validation rules. The County can use Platform Encryption to confidently prove compliance with privacy policies, regulatory requirements, and contractual obligations for handling private data. Platform Encryption offers native platform encryption and key management features. By default, the County's data is encrypted at rest using a hardware security module-based key derivation system. These features allow the County to protect data at a more granular level than Classic Encryption while still giving users the ability to perform necessary tasks. The County can: • Encrypt files and attachments (including email attachments) • Encrypt certain standard and custom fields • Encrypt Knowledge article fields and attachments • Encrypt certain Chatter data such as feed posts and comments, feed questions and answers, link labels and URLs, and feed polls and poll choices • Encrypt transcribed conversations (e.g. between agents and customers) • Access encrypted data from most elements in flows and processes, except when filtering or sorting records • Use the Shield Key Management System (KMS) to generate your org-specific tenant secret and data encryption key Platform Encryption helps address some concerns about protecting confidential information. It prevents sensitive data from being stored in clear, decipherable form and allows you to manage your tenant secrets, which are used to derive the keys that protect your data. Salesforce is committed to high security standards and offers multiple data encryption options. Customers who want to adopt or extend their use of Salesforce can consider using Platform Encryption to comply with various standards. Additional details on Salesforce Platform Encryption are provided in these white papers: https://a.sfdcstatic.com/content/dam/www/ocms/assets/pdf/platform/whitepaper-platform-shield.pdf and https://org62.my.salesforce.com/sfc/p/000000000062/a/0

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			M000000Htiv/0pEjEbyFd3.Yp1XI_zC1I6xuel9EsD0f.VKrwVFu64k. Please also refer to Platform Encryption Best Practices outlined at: https://help.salesforce.com/articleView?id=security_pe_best_practices.htm&language=en_US&type=0. In addition to the default Shield KMS service, multiple options are available for generating and managing your tenant secrets and data encryption keys outside of Salesforce, for added control and flexibility. With the Bring Your Own Key (BYOK) service, you have two options to manage your encryption key lifecycle: 1) use the infrastructure of your choice to generate a tenant secret and upload to the Shield KMS or 2) use the infrastructure of your choice to create a data encryption key instead of a tenant secret and upload to the Shield KMS. Additionally, with the Cache-Only Key Service you can store your key material outside of Salesforce and fetch your key on demand from a key service that you control. Additional details on the BYOK service are provided at https://help.salesforce.com/articleView?id=security_pe_byok_setup.htm&type=5. Additional details on the Cache-Only Key service are provided at https://help.salesforce.com/articleView?id=security_pe_byok_cache.htm&type=0.
46	If Cloud Hosted or Proposer Hosted, Solution is scanned for vulnerabilities on a regular basis (monthly) using commercially available vulnerability scanners such as Nessus, Qualys etc. Monthly vulnerability reports must be shared with the County.	Y	**Internal Vulnerability Assessment** Salesforce regularly performs self-vulnerability assessments using various tools and techniques, including tools such as Qualys. **Third-party Vulnerability Assessments** Salesforce uses external service providers to perform an application vulnerability assessment after each major release (three times annually) and network vulnerability assessments quarterly. Executive reports for these assessments are available for customers (under NDA) upon request.
47	Proposer regularly releases Solution patches with appropriate OS/database/application security patches. If Cloud Hosted or Proposer Hosted, Proposer applies patches within 30 days of release.	Y	When maintenance is scheduled, Salesforce publishes the dates and times of the maintenance windows on trust.salesforce.com, which shows a forward 12-month view of the maintenance windows Salesforce plans to take. Premier Alerts are sent via email when the maintenance windows are posted to trust.salesforce.com. Approximately one week prior to the scheduled maintenance, Salesforce communicates those dates and times via the in-application pop-up window upon login to Salesforce. In the event of planned maintenance that requires customer action in advance (e.g. updating network settings in preparation for additional login pools), Salesforce endeavors to communicate via email to system administrators of your organization months prior to the maintenance. Please note: If emergency system maintenance is

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			required, customers may be notified less than one (1) week in advance. There are two types of maintenance at Salesforce: System Maintenance and Release Maintenance. • System Maintenance is for sustaining the security, availability, and performance of the infrastructure supporting Salesforce services. • Release Maintenance is for upgrading Salesforce services to the latest product version to deliver enhanced features and functionality. There are three different kinds of release maintenance: major releases, patch releases, and emergency releases. Major Release Maintenance dates and times are posted on trust.salesforce.com approximately one year before the release date. To see the schedule for your instance click on https://status.salesforce.com and select the relevant instance. On the calendar click the release date to view further information. Major release maintenance occurs three times per year during the windows listed below. The instance will be unavailable for up to five minutes during the release window. Patch Releases and Emergency Releases are used to deliver scheduled and ad-hoc application fixes and are typically seamless to customers. Whenever possible, patches and emergency releases are deployed during off-peak hours and without downtime. Patch releases are scheduled weekly and are usually deployed to instances on Tuesday, Wednesday or Thursday, with release to Asia-Pacific instances the following day. Emergency releases are conducted on an as-needed basis and can occur any day of the week. Please refer to the following Help & Training article for more information: https://help.salesforce.com/apex/HTViewSolution?id=000176208&language=en_US.
48	Proposer releases "critical" security patches for the Solution immediately when a vulnerability is identified. If Cloud or Proposer Hosted, Proposer applies "critical" patches within 7 (seven) calendar days of release.	Y	Salesforce technical operations and security personnel monitor vulnerability alerts and patch release notifications from our vendors and other sources. When a patch is released, it is evaluated by the senior technical and management personnel. The evaluation examines the risk, severity, and mitigation efforts associated with the vulnerability and its associated patch, from which a course of action is prescribed. After initial evaluation, patching follows our Change Management Policy and Procedure, to track, test, and install the update, then notify appropriate internal parties. Depending on the severity and the risk to the Salesforce systems, security patches can be scheduled for immediate deployment or deferred to an appropriate

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			planned maintenance interval. All approved patches are also added to system build images. Additionally, please note that not all patches available for a given application or operating system are necessarily applicable to a particular environment, including Salesforce. This means that patches must be evaluated before installation, not simply loaded at the first possible opportunity.
49	Solution is maintained on current supported release of OS/database/applications . End of Life (EOL) versions will be upgraded prior to end of vendor support date.	Y	All upgrades, patches, and other system maintenance are provided as part of the subscription service at no additional cost to the County. In addition, Salesforce releases three complimentary upgrades each year, in Winter, Spring, and Summer versions. All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically on an opt-in basis). Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce is able to provide all of our customers with a service based on a single version of our application. We are able to upgrade all of our customers at the same time with each release. As a result, we do not have to maintain multiple versions of our application. Each release will be delivered automatically in a transparent manner and will not break your configurations.
50	Solution is scanned for application vulnerabilities on a regular basis (monthly) using commercially available vulnerability scanners such as HP WebInspect, Veracode, or IBM AppScan, or comparable.	Y	The County can conduct scans via WebInspect or comparable tools monthly. The CSP performs penetration tests after releases.
51	If Cloud Hosted or Proposer Hosted, Solution has change control processes implemented to provide application vulnerability scanning (PCI, OWASP top 20) prior to production migration of any changes. All "Medium, Critical, and Severe" vulnerabilities will be remediated prior to migration. Application vulnerability reports are be shared with the County.	Y	Salesforce performs the following tasks to assure security in the development lifecycle: Architecture Reviews, Development, Quality Assurance, Security Review, Definition of Done (requires that the new functionality meets all defined acceptance criteria in the areas of user stories, code development, quality assurance, security, performance/scalability, user experience, localization, documentation, product metrics, and vulnerability/bug analysis and remediation). As part of the coding, Salesforce includes practices including those specified by Open Web Application Security Project (OWASP). The third party vulnerability assessment includes checks against the OWASP Top Ten Most Critical Web Application Security Vulnerabilities and an external application security assessment. Salesforce incorporates security into its development

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			processes at all stages. From initial architecture considerations to post-release, all aspects of software development incorporate security. The Salesforce security team receives and reviews threat alerts from a variety of sources including SANS, US-CERT, and OWASP. Threats that are deemed critical are escalated to the appropriate resource to respond. For more information, please see: https://trailhead.salesforce.com/content/learn/modules/application-lifecycle-and-development-models.
52	All Solution APIs use API key security (X-API-Key) or demonstrate alternate security controls.	Y	Client applications that access the County's Salesforce data are subject to the same security protections that are used in the Salesforce user interface. Additional protection is available for organizations that install Salesforce AppExchange managed packages if those packages contain components that access Salesforce via the API.
53	If Cloud Hosted or Proposer Hosted, Solution is protected using Intrusion Detection and Prevention technology (IDS/IPS)	Y	Salesforce has implemented an Intrusion Detection System (IDS) to monitor for potential security incidents. IDS devices are placed between the edge routers and aggregation layer (in front of the load balancers), as well as placed behind the load balancers to monitor network traffic. • Detection rules are automatically updated daily; custom rules can be updated as needed. • The IDS is updated with the latest software release, following our change management process. • IDS, network device, and host events are collected and correlated in our security event management system. • The monitoring system is configured to generate and distribute alerts as security events occur in the environment.
54	If Cloud Hosted, or Proposer Hosted Solution is protected against Distributed Denial of Service (DDOS) Attack	Y	Salesforce uses a multi-layered approach as defined by industry best practices for denial of service protection. Salesforce uses multiple ISPs each providing at least a gigabit of connectivity. Traffic monitoring and anomaly detection allows proactive management and the ability to shutdown connections. We monitor continuously (both within our network and from the internet) and aggressively reap open and half-open TCP connections and sessions. Salesforce manages its own BGP and maintains its own autonomous system to control routing decisions. Salesforce has also implemented a DDOS mitigation service to mitigate the risk of DDOS attacks. Should activity associated with a DDoS attack be detected, then traffic will be re-routed through the service to ensure it's clean and the Salesforce customer base can continue

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			their business operations. Tests are performed periodically to verify DDOS mitigation.