

OFFICE OF THE CITY ATTORNEY  
CHARLES PARKIN, City Attorney  
333 West Ocean Boulevard, 11th Floor  
Long Beach, CA 90802-4664

AGREEMENT

**35182**

THIS AGREEMENT is made and entered, in duplicate, as of March 4, 2019, for reference purposes only, pursuant to a minute order adopted by the City Council of the City of Long Beach at its meeting on October 3, 2017, by and between TRUEPOINT SOLUTIONS LLC, a California limited liability company ("Consultant"), with a place of business at 3262 Penryn Road, Suite 100-B, Loomis, California 95650, and the CITY OF LONG BEACH, a municipal corporation ("City").

WHEREAS, City requires specialized services requiring unique skills to provide as-needed professional and technical services related to Land Management/Business Permits ("Project"); and

WHEREAS, City has selected Consultant in accordance with City's administrative procedures and City has determined that Consultant and its employees are qualified, licensed, if so required, and experienced in performing these specialized services; and

WHEREAS, City desires to have Consultant perform these specialized services, and Consultant is willing and able to do so on the terms and conditions in this Agreement;

NOW, THEREFORE, in consideration of the mutual terms, covenants, and conditions in this Agreement, the parties agree as follows:

1. SCOPE OF WORK OR SERVICES.

A. Consultant shall furnish specialized services more particularly described in Exhibit "A", attached to this Agreement and incorporated by this reference, in accordance with the standards of the profession, and City shall pay for these services in the manner described below, not to exceed One Hundred Forty-Seven Thousand Dollars (\$147,000), at the rates or charges shown in Exhibit "B".

B. The City's obligation to pay the sum stated above for any one fiscal year shall be contingent upon the City Council of the City appropriating the

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necessary funds for such payment by the City in each fiscal year during the term of this Agreement. For the purposes of this Section, a fiscal year commences on October 1 of the year and continues through September 30 of the following year. In the event that the City Council of the City fails to appropriate the necessary funds for any fiscal year, then, and in that event, the Agreement will terminate at no additional cost or obligation to the City.

C. Consultant may select the time and place of performance for these services; provided, however, that access to City documents, records and the like, if needed by Consultant, shall be available only during City's normal business hours and provided that milestones for performance, if any, are met.

D. Consultant has requested to receive regular payments. City shall pay Consultant in due course of payments following receipt from Consultant and approval by City of invoices showing the services or task performed, the time expended (if billing is hourly), and the name of the Project. Consultant shall certify on the invoices that Consultant has performed the services in full conformance with this Agreement and is entitled to receive payment. Each invoice shall be accompanied by a progress report indicating the progress to date of services performed and covered by the invoice, including a brief statement of any Project problems and potential causes of delay in performance, and listing those services that are projected for performance by Consultant during the next invoice cycle. Where billing is done and payment is made on an hourly basis, the parties acknowledge that this arrangement is either customary practice for Consultant's profession, industry or business, or is necessary to satisfy audit and legal requirements which may arise due to the fact that City is a municipality.

E. Consultant represents that Consultant has obtained all necessary information on conditions and circumstances that may affect its performance and has conducted site visits, if necessary.

F. CAUTION: Consultant shall not begin work until this

1 Agreement has been signed by both parties and until Consultant's evidence of  
2 insurance has been delivered to and approved by City.

3 2. TERM. The term of this Agreement shall commence at midnight on  
4 April 1, 2019, and shall terminate at 11:59 p.m. on March 31, 2020, unless sooner  
5 terminated as provided in this Agreement, or unless the services or the Project is  
6 completed sooner.

7 3. COORDINATION AND ORGANIZATION.

8 A. Consultant shall coordinate its performance with City's  
9 representative, if any, named in Exhibit "C", attached to this Agreement and  
10 incorporated by this reference. Consultant shall advise and inform City's  
11 representative of the work in progress on the Project in sufficient detail so as to  
12 assist City's representative in making presentations and in holding meetings on the  
13 Project. City shall furnish to Consultant information or materials, if any, described  
14 in Exhibit "D", attached to this Agreement and incorporated by this reference, and  
15 shall perform any other tasks described in the Exhibit.

16 B. The parties acknowledge that a substantial inducement to City  
17 for entering this Agreement was and is the reputation and skill of Consultant's key  
18 employee, named in Exhibit "E" attached to this Agreement and incorporated by this  
19 reference. City shall have the right to approve any person proposed by Consultant  
20 to replace that key employee.

21 4. INDEPENDENT CONTRACTOR. In performing its services,  
22 Consultant is and shall act as an independent contractor and not an employee,  
23 representative or agent of City. Consultant shall have control of Consultant's work and the  
24 manner in which it is performed. Consultant shall be free to contract for similar services to  
25 be performed for others during this Agreement; provided, however, that Consultant acts in  
26 accordance with Section 9 and Section 11 of this Agreement. Consultant acknowledges  
27 and agrees that (a) City will not withhold taxes of any kind from Consultant's compensation;  
28 (b) City will not secure workers' compensation or pay unemployment insurance to, for or

1 on Consultant's behalf; and (c) City will not provide and Consultant is not entitled to any of  
2 the usual and customary rights, benefits or privileges of City employees. Consultant  
3 expressly warrants that neither Consultant nor any of Consultant's employees or agents  
4 shall represent themselves to be employees or agents of City.

5 5. INSURANCE.

6 A. As a condition precedent to the effectiveness of this  
7 Agreement, Consultant shall procure and maintain, at Consultant's expense for the  
8 duration of this Agreement, from insurance companies that are admitted to write  
9 insurance in California and have ratings of or equivalent to A:V by A.M. Best  
10 Company or from authorized non-admitted insurance companies subject to Section  
11 1763 of the California Insurance Code and that have ratings of or equivalent to A:VIII  
12 by A.M. Best Company, the following insurance:

13 i. Commercial general liability insurance (equivalent in  
14 scope to ISO form CG 00 01 11 85 or CG 00 01 10 93) in an amount not less  
15 than \$1,000,000 per each occurrence and \$2,000,000 general aggregate.  
16 This coverage shall include but not be limited to broad form contractual  
17 liability, cross liability, independent contractors liability, and products and  
18 completed operations liability. City, its boards and commissions, and their  
19 officials, employees and agents shall be named as additional insureds by  
20 endorsement (on City's endorsement form or on an endorsement equivalent  
21 in scope to ISO form CG 20 10 11 85 or CG 20 26 11 85 or both CG 20 10  
22 07 04 and CG 20 37 07 04 or both CG 20 33 07 04 and CG 20 37 07 04),  
23 and this insurance shall contain no special limitations on the scope of  
24 protection given to City, its boards and commissions, and their officials,  
25 employees and agents. This policy shall be endorsed to state that the insurer  
26 waives its right of subrogation against City, its boards and commissions, and  
27 their officials, employees and agents.

28 ii. Workers' Compensation insurance as required by the

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California Labor Code and employer's liability insurance in an amount not less than \$1,000,000. This policy shall be endorsed to state that the insurer waives its right of subrogation against City, its boards and commissions, and their officials, employees and agents.

iii. Professional liability or errors and omissions insurance in an amount not less than \$1,000,000 per claim.

iv. Commercial automobile liability insurance (equivalent in scope to ISO form CA 00 01 06 92), covering Auto Symbol 1 (Any Auto) in an amount not less than \$500,000 combined single limit per accident.

B. Any self-insurance program, self-insured retention, or deductible must be separately approved in writing by City's Risk Manager or designee and shall protect City, its officials, employees and agents in the same manner and to the same extent as they would have been protected had the policy or policies not contained retention or deductible provisions.

C. Each insurance policy shall be endorsed to state that coverage shall not be reduced, non-renewed or canceled except after thirty (30) days prior written notice to City, shall be primary and not contributing to any other insurance or self-insurance maintained by City, and shall be endorsed to state that coverage maintained by City shall be excess to and shall not contribute to insurance or self-insurance maintained by Consultant. Consultant shall notify City in writing within five (5) days after any insurance has been voided by the insurer or cancelled by the insured.

D. If this coverage is written on a "claims made" basis, it must provide for an extended reporting period of not less than one hundred eighty (180) days, commencing on the date this Agreement expires or is terminated, unless Consultant guarantees that Consultant will provide to City evidence of uninterrupted, continuing coverage for a period of not less than three (3) years, commencing on the date this Agreement expires or is terminated.

1 E. Consultant shall require that all subconsultants or contractors  
2 that Consultant uses in the performance of these services maintain insurance in  
3 compliance with this Section unless otherwise agreed in writing by City's Risk  
4 Manager or designee.

5 F. Prior to the start of performance, Consultant shall deliver to City  
6 certificates of insurance and the endorsements for approval as to sufficiency and  
7 form. In addition, Consultant shall, within thirty (30) days prior to expiration of the  
8 insurance, furnish to City certificates of insurance and endorsements evidencing  
9 renewal of the insurance. City reserves the right to require complete certified copies  
10 of all policies of Consultant and Consultant's subconsultants and contractors, at any  
11 time. Consultant shall make available to City's Risk Manager or designee all books,  
12 records and other information relating to this insurance, during normal business  
13 hours.

14 G. Any modification or waiver of these insurance requirements  
15 shall only be made with the approval of City's Risk Manager or designee. Not more  
16 frequently than once a year, City's Risk Manager or designee may require that  
17 Consultant, Consultant's subconsultants and contractors change the amount, scope  
18 or types of coverages required in this Section if, in his or her sole opinion, the  
19 amount, scope or types of coverages are not adequate.

20 H. The procuring or existence of insurance shall not be construed  
21 or deemed as a limitation on liability relating to Consultant's performance or as full  
22 performance of or compliance with the indemnification provisions of this Agreement.

23 6. ASSIGNMENT AND SUBCONTRACTING. This Agreement  
24 contemplates the personal services of Consultant and Consultant's employees, and the  
25 parties acknowledge that a substantial inducement to City for entering this Agreement was  
26 and is the professional reputation and competence of Consultant and Consultant's  
27 employees. Consultant shall not assign its rights or delegate its duties under this  
28 Agreement, or any interest in this Agreement, or any portion of it, without the prior approval

1 of City, except that Consultant may with the prior approval of the City Manager of City,  
2 assign any moneys due or to become due Consultant under this Agreement. Any  
3 attempted assignment or delegation shall be void, and any assignee or delegate shall  
4 acquire no right or interest by reason of an attempted assignment or delegation.  
5 Furthermore, Consultant shall not subcontract any portion of its performance without the  
6 prior approval of the City Manager or designee, or substitute an approved subconsultant  
7 or contractor without approval prior to the substitution. Nothing stated in this Section shall  
8 prevent Consultant from employing as many employees as Consultant deems necessary  
9 for performance of this Agreement.

10 7. CONFLICT OF INTEREST. Consultant, by executing this Agreement,  
11 certifies that, at the time Consultant executes this Agreement and for its duration,  
12 Consultant does not and will not perform services for any other client which would create  
13 a conflict, whether monetary or otherwise, as between the interests of City and the interests  
14 of that other client. Consultant further certifies that Consultant does not now have and shall  
15 not acquire any interest, direct or indirect, in the area covered by this Agreement or any  
16 other source of income, interest in real property or investment which would be affected in  
17 any manner or degree by the performance of Consultant's services hereunder. And,  
18 Consultant shall obtain similar certifications from Consultant's employees, subconsultants  
19 and contractors.

20 8. MATERIALS. Consultant shall furnish all labor and supervision,  
21 supplies, materials, tools, machinery, equipment, appliances, transportation and services  
22 necessary to or used in the performance of Consultant's obligations under this Agreement,  
23 except as stated in Exhibit "D".

24 9. OWNERSHIP OF DATA. All materials, information and data  
25 prepared, developed or assembled by Consultant or furnished to Consultant in connection  
26 with this Agreement, including but not limited to documents, estimates, calculations,  
27 studies, maps, graphs, charts, computer disks, computer source documentation, samples,  
28 models, reports, summaries, drawings, designs, notes, plans, information, material and

1 memorandum ("Data") shall be the exclusive property of City. Data shall be given to City,  
2 and City shall have the unrestricted right to use and disclose the Data in any manner and  
3 for any purpose without payment of further compensation to Consultant. Copies of Data  
4 may be retained by Consultant but Consultant warrants that Data shall not be made  
5 available to any person or entity for use without the prior approval of City. This warranty  
6 shall survive termination of this Agreement for five (5) years.

7 10. TERMINATION. Either party shall have the right to terminate this  
8 Agreement for any reason or no reason at any time by giving fifteen (15) calendar days  
9 prior written notice to the other party. In the event of termination under this Section, City  
10 shall pay Consultant for services satisfactorily performed and costs incurred up to the  
11 effective date of termination for which Consultant has not been previously paid. The  
12 procedures for payment in Section 1.B. with regard to invoices shall apply. On the effective  
13 date of termination, Consultant shall deliver to City all Data developed or accumulated in  
14 the performance of this Agreement, whether in draft or final form, or in process. And,  
15 Consultant acknowledges and agrees that City's obligation to make final payment is  
16 conditioned on Consultant's delivery of the Data to City.

17 11. CONFIDENTIALITY. Consultant shall keep all Data confidential and  
18 shall not disclose the Data or use the Data directly or indirectly, other than in the course of  
19 performing its services, during the term of this Agreement and for five (5) years following  
20 expiration or termination of this Agreement. In addition, Consultant shall keep confidential  
21 all information, whether written, oral or visual, obtained by any means whatsoever in the  
22 course of performing its services for the same period of time. Consultant shall not disclose  
23 any or all of the Data to any third party, or use it for Consultant's own benefit or the benefit  
24 of others except for the purpose of this Agreement.

25 12. BREACH OF CONFIDENTIALITY. Consultant shall not be liable for  
26 a breach of confidentiality with respect to Data that: (a) Consultant demonstrates  
27 Consultant knew prior to the time City disclosed it; or (b) is or becomes publicly available  
28 without breach of this Agreement by Consultant; or (c) a third party who has a right to



1 disclose does so to Consultant without restrictions on further disclosure; or (d) must be  
2 disclosed pursuant to subpoena or court order.

3 13. ADDITIONAL COSTS AND REDESIGN.

4 A. Any costs incurred by City due to Consultant's failure to meet  
5 the standards required by the scope of work or Consultant's failure to perform fully  
6 the tasks described in the scope of work which, in either case, causes City to request  
7 that Consultant perform again all or part of the Scope of Work shall be at the sole  
8 cost of Consultant and City shall not pay any additional compensation to Consultant  
9 for its re-performance.

10 B. If the Project involves construction and the scope of work  
11 requires Consultant to prepare plans and specifications with an estimate of the cost  
12 of construction, then Consultant may be required to modify the plans and  
13 specifications, any construction documents relating to the plans and specifications,  
14 and Consultant's estimate, at no cost to City, when the lowest bid for construction  
15 received by City exceeds by more than ten percent (10%) Consultant's estimate.  
16 This modification shall be submitted in a timely fashion to allow City to receive new  
17 bids within four (4) months after the date on which the original plans and  
18 specifications were submitted by Consultant.

19 14. AMENDMENT. This Agreement, including all Exhibits, shall not be  
20 amended, nor any provision or breach waived, except in writing signed by the parties which  
21 expressly refers to this Agreement.

22 15. LAW. This Agreement shall be construed in accordance with the laws  
23 of the State of California, and the venue for any legal actions brought by any party with  
24 respect to this Agreement shall be the County of Los Angeles, State of California for state  
25 actions and the Central District of California for any federal actions. Consultant shall cause  
26 all work performed in connection with construction of the Project to be performed in  
27 compliance with (1) all applicable laws, ordinances, rules and regulations of federal, state,  
28 county or municipal governments or agencies (including, without limitation, all applicable

1 federal and state labor standards, including the prevailing wage provisions of sections 1770  
2 *et seq.* of the California Labor Code); and (2) all directions, rules and regulations of any fire  
3 marshal, health officer, building inspector, or other officer of every governmental agency  
4 now having or hereafter acquiring jurisdiction.

5 16. PREVAILING WAGES.

6 A. Consultant agrees that all public work (as defined in California  
7 Labor Code section 1720) performed pursuant to this Agreement (the "Public  
8 Work"), if any, shall comply with the requirements of California Labor Code sections  
9 1770 *et seq.* City makes no representation or statement that the Project, or any  
10 portion thereof, is or is not a "public work" as defined in California Labor Code  
11 section 1720.

12 B. In all bid specifications, contracts and subcontracts for any  
13 such Public Work, Consultant shall obtain the general prevailing rate of per diem  
14 wages and the general prevailing rate for holiday and overtime work in this locality  
15 for each craft, classification or type of worker needed to perform the Public Work,  
16 and shall include such rates in the bid specifications, contract or subcontract. Such  
17 bid specifications, contract or subcontract must contain the following provision: "It  
18 shall be mandatory for the contractor to pay not less than the said prevailing rate of  
19 wages to all workers employed by the contractor in the execution of this contract.  
20 The contractor expressly agrees to comply with the penalty provisions of California  
21 Labor Code section 1775 and the payroll record keeping requirements of California  
22 Labor Code section 1771."

23 17. ENTIRE AGREEMENT. This Agreement, including all Exhibits,  
24 constitutes the entire understanding between the parties and supersedes all other  
25 agreements, oral or written, with respect to the subject matter in this Agreement.

26 18. INDEMNITY.

27 A. Consultant shall indemnify, protect and hold harmless City, its  
28 Boards, Commissions, and their officials, employees and agents ("Indemnified

1 Parties”), from and against any and all liability, claims, demands, damage, loss,  
2 obligations, causes of action, proceedings, awards, fines, judgments, penalties,  
3 costs and expenses, arising or alleged to have arisen, in whole or in part, out of or  
4 in connection with (1) Consultant’s breach or failure to comply with any of its  
5 obligations contained in this Agreement, including any obligations arising from the  
6 Project’s compliance with or failure to comply with applicable laws, including all  
7 applicable federal and state labor requirements including, without limitation, the  
8 requirements of California Labor Code section 1770 *et seq.* or (2) negligent or willful  
9 acts, errors, omissions or misrepresentations committed by Consultant, its officers,  
10 employees, agents, subcontractors, or anyone under Consultant’s control, in the  
11 performance of work or services under this Agreement (collectively “Claims” or  
12 individually “Claim”).

13 B. In addition to Consultant’s duty to indemnify, Consultant shall  
14 have a separate and wholly independent duty to defend Indemnified Parties at  
15 Consultant’s expense by legal counsel approved by City, from and against all  
16 Claims, and shall continue this defense until the Claims are resolved, whether by  
17 settlement, judgment or otherwise. No finding or judgment of negligence, fault,  
18 breach, or the like on the part of Consultant shall be required for the duty to defend  
19 to arise. City shall notify Consultant of any Claim, shall tender the defense of the  
20 Claim to Consultant, and shall assist Consultant, as may be reasonably requested,  
21 in the defense.

22 C. If a court of competent jurisdiction determines that a Claim was  
23 caused by the sole negligence or willful misconduct of Indemnified Parties,  
24 Consultant’s costs of defense and indemnity shall be (1) reimbursed in full if the  
25 court determines sole negligence by the Indemnified Parties, or (2) reduced by the  
26 percentage of willful misconduct attributed by the court to the Indemnified Parties.

27 D. The provisions of this Section shall survive the expiration or  
28 termination of this Agreement.

1           19. AMBIGUITY. In the event of any conflict or ambiguity between this  
2 Agreement and any Exhibit, the provisions of this Agreement shall govern.

3           20. NONDISCRIMINATION.

4           A. In connection with performance of this Agreement and subject  
5 to applicable rules and regulations, Consultant shall not discriminate against any  
6 employee or applicant for employment because of race, religion, national origin,  
7 color, age, sex, sexual orientation, gender identity, AIDS, HIV status, handicap or  
8 disability. Consultant shall ensure that applicants are employed, and that  
9 employees are treated during their employment, without regard to these bases.  
10 These actions shall include, but not be limited to, the following: employment,  
11 upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or  
12 termination; rates of pay or other forms of compensation; and selection for training,  
13 including apprenticeship.

14           B. It is the policy of City to encourage the participation of  
15 Disadvantaged, Minority and Women-Owned Business Enterprises in City's  
16 procurement process, and Consultant agrees to use its best efforts to carry out this  
17 policy in its use of subconsultants and contractors to the fullest extent consistent  
18 with the efficient performance of this Agreement. Consultant may rely on written  
19 representations by subconsultants and contractors regarding their status.  
20 Consultant shall report to City in May and in December or, in the case of short-term  
21 agreements, prior to invoicing for final payment, the names of all subconsultants  
22 and contractors hired by Consultant for this Project and information on whether or  
23 not they are a Disadvantaged, Minority or Women-Owned Business Enterprise, as  
24 defined in Section 8 of the Small Business Act (15 U.S.C. Sec. 637).

25           21. EQUAL BENEFITS ORDINANCE. Unless otherwise exempted in  
26 accordance with the provisions of the Ordinance, this Agreement is subject to the  
27 applicable provisions of the Equal Benefits Ordinance (EBO), section 2.73 et seq. of the  
28 Long Beach Municipal Code, as amended from time to time.

1           A.     During the performance of this Agreement, the Consultant  
2 certifies and represents that the Consultant will comply with the EBO. The  
3 Consultant agrees to post the following statement in conspicuous places at its place  
4 of business available to employees and applicants for employment:

5           “During the performance of a contract with the City of Long Beach, the  
6 Consultant will provide equal benefits to employees with spouses and its  
7 employees with domestic partners. Additional information about the City of  
8 Long Beach’s Equal Benefits Ordinance may be obtained from the City of  
9 Long Beach Business Services Division at 562-570-6200.”

10          B.     The failure of the Consultant to comply with the EBO will be  
11 deemed to be a material breach of the Agreement by the City.

12          C.     If the Consultant fails to comply with the EBO, the City may  
13 cancel, terminate or suspend the Agreement, in whole or in part, and monies due or  
14 to become due under the Agreement may be retained by the City. The City may  
15 also pursue any and all other remedies at law or in equity for any breach.

16          D.     Failure to comply with the EBO may be used as evidence  
17 against the Consultant in actions taken pursuant to the provisions of Long Beach  
18 Municipal Code 2.93 et seq., Contractor Responsibility.

19          E.     If the City determines that the Consultant has set up or used its  
20 contracting entity for the purpose of evading the intent of the EBO, the City may  
21 terminate the Agreement on behalf of the City. Violation of this provision may be  
22 used as evidence against the Consultant in actions taken pursuant to the provisions  
23 of Long Beach Municipal Code Section 2.93 et seq., Contractor Responsibility.

24          22.    NOTICES. Any notice or approval required by this Agreement shall  
25 be in writing and personally delivered or deposited in the U.S. Postal Service, first class,  
26 postage prepaid, addressed to Consultant at the address first stated above, and to City at  
27 333 West Ocean Boulevard, Long Beach, California 90802, Attn: City Manager, with a copy  
28 to the City Engineer at the same address. Notice of change of address shall be given in

1 the same manner as stated for other notices. Notice shall be deemed given on the date  
2 deposited in the mail or on the date personal delivery is made, whichever occurs first.

3 23. COPYRIGHTS AND PATENT RIGHTS.

4 A. Consultant shall place the following copyright protection on all  
5 Data: © City of Long Beach, California \_\_\_\_, inserting the appropriate year.

6 B. City reserves the exclusive right to seek and obtain a patent or  
7 copyright registration on any Data or other result arising from Consultant's  
8 performance of this Agreement. By executing this Agreement, Consultant assigns  
9 any ownership interest Consultant may have in the Data to City.

10 C. Consultant warrants that the Data does not violate or infringe  
11 any patent, copyright, trade secret or other proprietary right of any other party.  
12 Consultant agrees to and shall protect, defend, indemnify and hold City, its officials  
13 and employees harmless from any and all claims, demands, damages, loss, liability,  
14 causes of action, costs or expenses (including reasonable attorney's fees) whether  
15 or not reduced to judgment, arising from any breach or alleged breach of this  
16 warranty.

17 24. COVENANT AGAINST CONTINGENT FEES. Consultant warrants

18 that Consultant has not employed or retained any entity or person to solicit or obtain this  
19 Agreement and that Consultant has not paid or agreed to pay any entity or person any fee,  
20 commission or other monies based on or from the award of this Agreement. If Consultant  
21 breaches this warranty, City shall have the right to terminate this Agreement immediately  
22 notwithstanding the provisions of Section 10 or, in its discretion, to deduct from payments  
23 due under this Agreement or otherwise recover the full amount of the fee, commission or  
24 other monies.

25 25. WAIVER. The acceptance of any services or the payment of any

26 money by City shall not operate as a waiver of any provision of this Agreement or of any  
27 right to damages or indemnity stated in this Agreement. The waiver of any breach of this  
28 Agreement shall not constitute a waiver of any other or subsequent breach of this

1 Agreement.

2           26. CONTINUATION. Termination or expiration of this Agreement shall  
3 not affect rights or liabilities of the parties which accrued pursuant to Sections 7, 10, 11,  
4 17, 19, 22 and 28 prior to termination or expiration of this Agreement.

5           27. TAX REPORTING. As required by federal and state law, City is  
6 obligated to and will report the payment of compensation to Consultant on Form 1099-  
7 Misc. Consultant shall be solely responsible for payment of all federal and state taxes  
8 resulting from payments under this Agreement. Consultant shall submit Consultant's  
9 Employer Identification Number (EIN), or Consultant's Social Security Number if  
10 Consultant does not have an EIN, in writing to City's Accounts Payable, Department of  
11 Financial Management. Consultant acknowledges and agrees that City has no obligation  
12 to pay Consultant until Consultant provides one of these numbers.

13           28. ADVERTISING. Consultant shall not use the name of City, its officials  
14 or employees in any advertising or solicitation for business or as a reference, without the  
15 prior approval of the City Manager or designee.

16           29. AUDIT. City shall have the right at all reasonable times during the  
17 term of this Agreement and for a period of five (5) years after termination or expiration of  
18 this Agreement to examine, audit, inspect, review, extract information from and copy all  
19 books, records, accounts and other documents of Consultant relating to this Agreement.

20           30. THIRD PARTY BENEFICIARY. This Agreement is not intended or  
21 designed to or entered for the purpose of creating any benefit or right for any person or  
22 entity of any kind that is not a party to this Agreement.

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OFFICE OF THE CITY ATTORNEY  
CHARLES PARKIN, City Attorney  
333 West Ocean Boulevard, 11th Floor  
Lona Beach, CA 90802-4664

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IN WITNESS WHEREOF, the parties have caused this document to be duly executed with all formalities required by law as of the date first stated above.

TRUEPOINT SOLUTIONS LLC, a California limited liability company

March 8, 2019

By [Signature]  
Name KENT JOHNSON  
Title CEO

March 8, 2019

By [Signature]  
Name Don Hunsinger  
Title PARTNER

**Tom Modica  
Assistant City Manager**

"Consultant"

**EXECUTED PURSUANT  
TO SECTION 301 OF  
THE CITY CHARTER**

CITY OF LONG BEACH, a municipal corporation

March 27, 2019

By [Signature]  
City Manager

"City"

This Agreement is approved as to form on March 12, 2019.

CHARLES PARKIN, City Attorney

By [Signature]  
Deputy



# EXHIBIT “A”

## Scope of Work

# **Long Beach Development Services**

**Statement of Work for the**

**IPS Technical Assessment**

*Submitted by:*

**TruePoint**  
Solutions

*3262 Penryn Rd.  
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*Submittal Date  
February 11, 2019*

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Ryan Kurtzman  
City of Long Beach  
City Manager's Office  
333 W. Ocean Blvd.,  
Long Beach, CA 90802

**RE: Long Beach Infor/Hansen Technical Assessment - Request for Bid/Quote**

Dear Mr. Kurtzman and Evaluation Committee:

We are pleased to submit our revised Statement of Work in response to the City of Long Beach's request for an Infor Public Sector (IPS) Technical Assessment. We are confident that the pages that follow present a Statement of Work that will help ensure the City's success on this project.

We would again like to thank you for your consideration.

Regards,



Kent Johnson  
TruePoint Solutions  
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**COMPANY OVERVIEW**

- TruePoint Solutions

**Incorporated:**

- 2004
- 51 employees

**Professional Services:**

- Business Analysis
- Configuration
- Data Conversion
- Report Development
- Event Scripting
- Interface Development
- Consulting
- Training

**Industry:**

- State and Local Government

**Industry Focus:**

- Land Management and Permitting
- Business and Trade Licensing
- Code Enforcement
- Asset Management
- Electronic Document Review
- Utility Billing
- IT Consulting

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## Document History

Version	Date	Author(s)	Comments
1.0	January 15, 2019	Paula Montoya	Baseline version
2.0	February 11, 2019	Paula Montoya	Updated with refined scope per Long Beach requests

## Glossary

The following terms and acronyms & abbreviations are used in this document.

Term	Description
IPS	Infor Public Sector
TPS	TruePoint Solutions
SOW	Statement of work

## Introduction

### ***Purpose***

The purpose of this statement of work (SOW) is to provide a comprehensive document for managing the IPS Technical Assessment for Long Beach Development Services to be performed by TruePoint Solutions (TPS).

The document defines activities to be performed during each task for each deliverable. It outlines basic responsibilities and expectations of each party.

### ***Scope***

To provide a baseline understanding between TPS and Long Beach Development Services.

- Task 1
- Task 2
- Task 3

### ***Nomenclature***

Please note that the terms *IPS solution* and *IPS system* are used synonymously throughout this document.

## Task 1 – Gap Analysis

### Summary:

- i. Conduct a gap analysis of the Development Services IPS features and functionalities at the City's current version that the City is not using, and - in consideration of upcoming versions - that could be used to streamline end user workflow and continual support.
- ii. Analyze only IPS features, functionalities, and modules (including integration between these modules) related to the following Development Services processes and programs:
  1. The development / planning / entitlement / permitting process.
  2. The code enforcement / Proactive Rental Housing Inspection Program (PRHIP).
  3. Exclude Business Licensing processes and modules.

### Sub-tasks:

- i. Review the City's existing list of IPS Development Services enhancement requests and the City's preliminary Fall 2017 IPS assessment findings and recommendations..
- ii. Meet with the City's Departmental representatives to understand information technology business needs expected to be satisfied by IPS.
- iii. Meet with City IPS "power users" to understand pain points and frustrations, specifically (but not limited to) communication between teams, data entry, and reporting.
  1. Shadow "power users" at the Permit Counter and at their desks.
- iv. Consider the following City focus area
  1. Usability and end user experience, including ease of data input.
- v. Conduct a Task kickoff meeting with City staff to understand goals and develop a work plan. Provide ongoing communications with City regarding Task progress.

### Deliverables:

1. Business Processes
  - a) Recommendations to streamline City IPS business processes/workflows in accordance with business needs, citywide policies, and IPS software capabilities - to reduce or optimize IPS customizations.
2. IPS Configurations
  - a) Recommendations on optimal software configurations and efficiencies, including integrations with external systems and integrations between IPS modules.

**Assumptions/Understandings:**

- Though Business and Trade Licensing is being entirely excluded, it cannot be excluded for the purpose of supporting this task. Items that could be included:
  - IPS Configuration
  - IPS Workflow development (SWM)
  - IPS Content Manager changes to Licensing forms or System forms
  - Database triggers to Licensing or System tables
  - Any interfaces to Licensing or the System not mentioned in this SOW
- All interfaces with IPS will be reviewed for the purpose of supporting this task.
- VPN access to a Test IPS environment will be provided prior to first visit
- IPS Development Services Enhancement request list will be provided prior to first visit
- Any lists of issues already started by Development Services will be provided prior to first visit.

**Costs:**

<b>Deliverable</b>	<b>Total</b>
Business Process Recommendations- Building	\$22,000.00
Business Process Recommendations- Planning	\$22,000.00
Business Process Recommendations- Code Enforcement	\$22,000.00
IPS Configuration Optimizations- Building	\$22,000.00
IPS Configuration Optimizations - Planning	\$22,000.00
IPS Configuration Optimizations - Code Enforcement	\$22,000.00
Subtotal	\$132,000.00
Expenses (actuals billed as incurred)	\$15,000.00
<b>Total</b>	<b>\$147,000.00</b>

## Task 2 – Scope of IPS Configuration Work

### Summary:

- i. Upon completion of Task 1, create a scope of IPS configuration work to meet Business Processes, IPS Configurations, and Data Extraction recommendations.

### Sub-tasks:

- i. Review the City's existing list of IPS enhancement requests and the City's preliminary fall 2017 IPS assessment findings and recommendations.
- ii. Reference Task 1 deliverables.
- iii. Consider immediate City priorities (which include, but are not limited to):
  1. Improvements that will save end users the most time in relation to the amount of work necessary.
  2. Preparation for implementation and integration of Rhythm for Civics, electronic plan check software that includes document upload, a customer payment portal, Infor Field Inspector for code enforcement inspections, and Infor software for the public to set up inspection appointments.
  3. Implementation of milestones for the 'Planning' module.
  4. Elimination of two Planning Bureau workaround spreadsheets by adding necessary fields into IPS, including retroactive input of spreadsheet data, to create a single location for project data.
  5. Improving public access to data and ensuring software users can easily and quickly export data from IPS for reporting purposes.
  6. Internal reporting, metrics, and analysis features, including a feature to allow managers to account for time spent on various IPS module workflow steps.
- iv. Conduct a Task kickoff meeting with City staff to understand goals and develop a work plan. Provide ongoing communications with City regarding Task progress.

### Deliverables:

- i. A list of requirements currently unmet by IPS to meet the **Business Processes, IPS Configurations, and Data Extraction** recommendations. For each work item, include:
  1. Level of effort (low, medium, high)
  2. Estimate of hours to complete
  3. Expected value in time saved
  4. City priority

### Assumptions/Understandings:

- i. The work for this task will be determined at the conclusion of Task 1. It is not possible to quote costs until then. Rates have been included for this task.

### Costs:

Expenses will be billed as incurred.

Role	Hourly Rates
Project Manager	\$185.00
Technical Analyst	\$175.00
Business Analyst	\$175.00



## Task 3 – Software Configuration

### Summary:

- i. Configure IPS software to meet select requirements identified in Task 2.

### Sub-tasks:

- i. i. Consult list of requirements identified in Task 2.
- ii. ii. Identify priority requirements with City based upon designations of level of effort, estimate of hours to complete, expected value in time saved, and City priority.
- iii. iii. Consider an agile software development methodology.
- iv. iv. Consider TID's existing pipeline for IPS software development.
- v. v. Conduct a Task kickoff meeting with City staff to understand goals and develop a work plan. Provide ongoing communications with City regarding Task progress.

### Deliverables:

- i. A user-friendly IPS production environment system that satisfies the requirements identified in Task 2 and selected by City.
- ii. Documentation of the resolution of software requirements and written testing instructions.
- iii. A training manual that documents procedures for processing new or modified basic workflow processes in the IPS system.

### Assumptions/Understandings:

- i. The work for this task will be determined at the conclusion of Task 1 and 2. It is not possible to quote costs until then. Rates have been included for this task.

### Costs:

Expenses will be billed as incurred.

Role	Hourly Rates
Project Manager	\$185.00
Technical Analyst	\$175.00
Business Analyst	\$175.00

## TruePoint Implementation Methodology

### ***Implementation Strategy***

System implementation is a critical activity that sets the tone for the Agency's ongoing use of the Infor system. A TruePoint Solutions implementation team will lead project management, working in partnership with Agency staff to confirm that this project is delivered on time and within budget. **The TruePoint Solutions Implementation Strategy requires customers to be active team members in the implementation to ensure the solution ultimately meets their needs, as all TruePoint Solutions project tasks require input, prerequisite tasks, development and extensive reviews from the customer.**

#### Critical Success Factors

Project implementation will be a collaborative effort between the Agency and TruePoint Solutions. Significant time will be spent to ensure Agency goals are met, as defined in the Statement of Work. The following list identifies the critical factors that typically have a significant impact on an implementation:

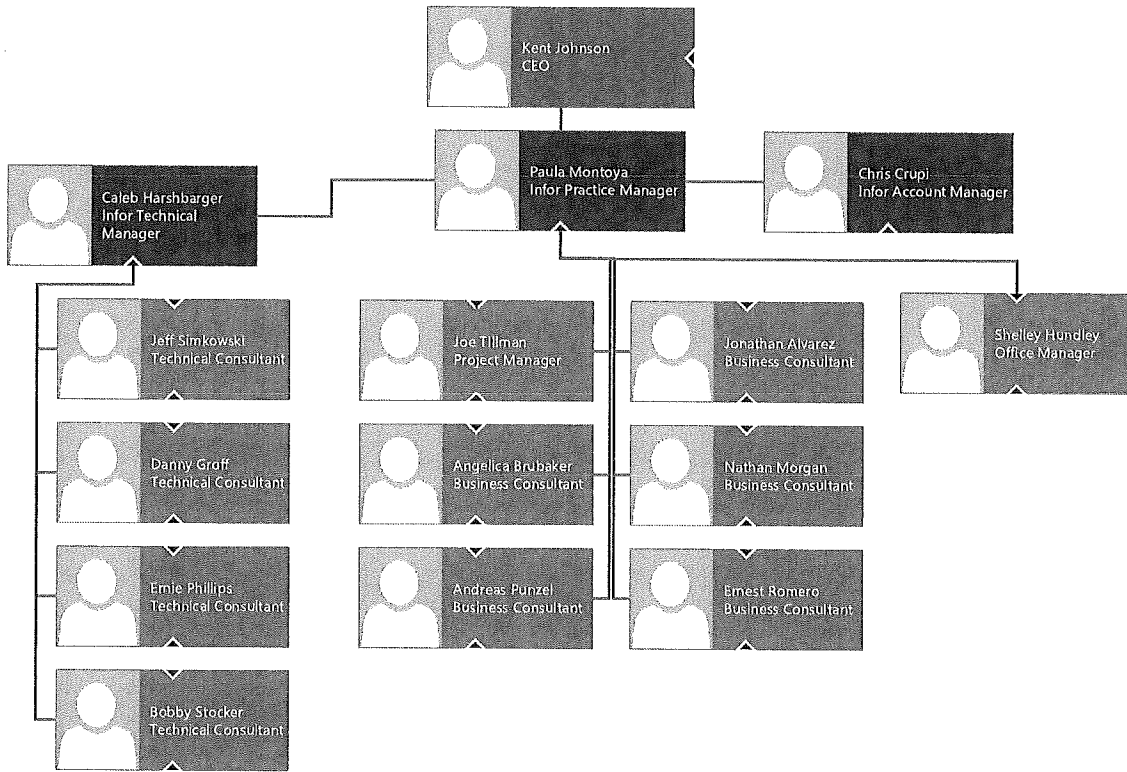
- **Dedicated Agency Participation** – TruePoint Solution fully understands that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Infor implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of services as defined in the Project Plan. We will communicate insufficient participation of Agency and TruePoint Solution resources through Project Status Reports with real and potential impacts to the project timeline. We will work with the project sponsors and project manager to determine appropriate team member involvement.
- **Best Practice Experiences** – TruePoint's Best Practice experiences, are based on direct experience with hundreds of existing customers and domain experts. This experience provides complete understanding of working business processes including workflows, data structures, business logic, form and standard reports. This will be utilized as the baseline for the solution, which will decrease risk, expedite deployment and ensure a superior utilization of the Infor solution.
- **Knowledge Transfer** – While TruePoint Solution cannot guarantee specific expertise for Agency staff because of participating in the project, we will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel participate in the phases of TruePoint Solution to transfer knowledge to the Agency.
- **Deliverable Acceptance Process** – Upon completion of each deliverable according to the acceptance criteria defined herein, TruePoint Solution will provide the Agency with a Deliverable Acceptance Form to formalize acceptance and completion. This form is subsequently signed by the appropriate Agency contact, as defined in the Project Charter, and scanned/emailed or hand delivered to TruePoint Solution. Deliverable review cycles, if extensive, can extend the length of a project significantly.

- **TruePoint Solutions' Implementation Strategy** – TruePoint Solutions' successful, proven, implementation Strategy is crucial to the project success. TruePoint Solutions' software and customer base is a niche market and, as such, the implementation Strategy may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to our implementation Strategy.
- **Documentation of Current Processes and Systems** – The level of available documentation can impact a project schedule considerably. Proper documentation can expedite the learning process for consultants, while limited documentation can result in additional phases (i.e., As-Is documentation, requirements validation and review).
- **Complexity of Scope and Requirements** including:
  - Number of departments, divisions, user groups and/or agencies to which the software is deployed.
  - Level of automation required and degree to which clients rely on inherent COTS configuration that maximizes out of the box functionality thereby reducing ongoing maintenance and support efforts.
  - Conversion requirements – number and complexity of sources systems for data migration. System factors that lead to additional complexity include data cleansing requirements (if any) and/or converting legacy systems with limited and/or no documentation.
  - Interfaces requirements – number and complexity of interfaces and specification of such, including but not limited to the frequency and type of data to be exchanged.
  - Training requirements – including the number of business users that will require training and the schedule to do so in a manner that minimizes impact to operations.
  - Testing requirements – including the time and effort available of Agency staff to define and accurately and adequately test the new functionality and data migrated.

While some or all of these factors influence the overall project schedule, it is critical to understand the business reasons for implementation, including the overall goals and objectives of our clients. Often our clients are working to implement mandated requirements within specified timeframes; other clients seek to increase efficiency, extend transparency and/or reduce overall spending on custom development efforts. The goals and objectives of our clients need to be considered in the development of an overall project schedule that reduces risk, maximizes benefit and works within the constraints of the agency.

Finally, TruePoint is a certified Agile Implementation team. Though we will implement using traditional methods such as waterfall, there are far more successful merits to implementing using Agile methodologies. It is our goal to work with the customer to ensure their directives are met however they are most comfortable. We will discuss implementation practices on the onset of the project and determine which best suits the City.

## TruePoint Staff



# EXHIBIT “B”

Rates or Charges

Costs:

Expenses will be billed as incurred.

<b><u>Role</u></b>	<b><u>Hourly Rates</u></b>
Project Manager	\$185.00
Technical Analyst	\$175.00
Business Analyst	\$175.00

# EXHIBIT “C”

City’s Representative:

Vanessa Llanes

(562) 570-5090

# EXHIBIT “D”

Materials/Information Furnished: None



# EXHIBIT “E”

Consultant’s Key Employee:

Paula Montoya