

THIS FIRST AMENDMENT TO AGREEMENT NO. 33580 is made and entered, in duplicate, as of June 27, 2016, for reference purposes only, pursuant to a minute order adopted by the City Council of the City of Long Beach at its meeting on August 19, 2014, by and between SIMPLER SYSTEMS, INC., a California corporation ("Consultant"), with a place of business at 210 West Cota Street, Santa Barbara, California 93101, and the CITY OF LONG BEACH, a municipal corporation ("City").

WHEREAS, City and Consultant entered Agreement No. 33580 (the "Agreement") whereby Consultant agreed to provide these services; and

WHEREAS, City and Consultant desire to extend the term and add \$150,000 for a total not to exceed Agreement amount of \$450,000;

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

1. Section 1.A. of the Agreement is hereby amended to read as follows:

"A. Consultant shall furnish specialized services more particularly described in Exhibit "A", attached to the 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, in a total amount not to exceed Four Hundred Fifty Thousand Dollars (\$450,000.00) at the rates or charges shown in Exhibit "A"."

2. Section 2 of the Agreement is hereby amended to read as follows:

"2. TERM. The term of this Agreement shall commence on October 1, 2014, and shall terminate on September 30, 2017, unless terminated earlier, as provided in this Agreement. The Agreement may be extended for one (1) additional one-year

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

term, at the discretion of the City Manager."

3. Except as expressly modified herein, all of the terms and conditions contained in Agreement No. 33580 are ratified and confirmed and shall remain in full force and effect.

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.

SIMPLER SYSTEMS, INC., a California corporation

By Richard Schettler  
Name Richard Schettler  
Title President

By Barry Jangler  
Name Barry Jangler  
Title Vice-President

"Consultant"

CITY OF LONG BEACH, a municipal corporation

By TBM  
Name TBM  
Title City Manager  
Assistant City Manager

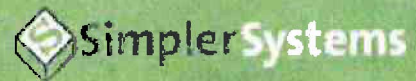
"City"

This First Amendment to Agreement No. 33580 is approved as to form on

July 11, 2016.

CHARLES PARKIN, City Attorney

By Charles Parkin  
Deputy



# PROPOSAL

*for the City of Long Beach*

August 7, 2014

210 West Cota Street  
Santa Barbara, CA 93101  
OFFICE 805.882.1848  
[simplersystems.com](http://simplersystems.com)

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### Proposal

Simpler Systems and Cardon Solutions, LLC (Cardon) propose to provide the following:

- (1) Provide access to Simpler Reporting to an unlimited number of City users, and provide maintenance services for Simpler Reporting.
- (2) Develop enhancements to Simpler Reporting (e.g. dashboard, ERP conversion analysis, etc.) as directed by City staff.
- (3) Implement additional subject areas as directed by City staff.
- (4) Provide additional technical services as directed by City staff.
- (5) Provide business process or other analysis as directed by City staff.

**Project Planning & Management**

Our team recognizes the importance of project planning and management in any successful software project. At the start of the fiscal year, we will conduct a planning session with the City to define a high-level project scope, expected priorities, and estimated timing of the services to be provided.

**Analysis**

For each proposed modification / new subject area, the Simpler Systems / Cardon team will:

- Conduct review of the City's reporting requirements
- Perform a fit/gap analysis, and identify changes required to meet the City's needs
- Work with the City to prioritize changes and develop final scope
- Document necessary changes for input into the software development and configuration phase
- Identify tables and data to be extracted to support reporting and inquiry

**Development**

During this phase, the changes and customizations identified during the analysis phase will be incorporated into Simpler Reporting.

Simpler Systems and Cardon will perform the development work with primarily remote resources.

**Delivery**

Once Simpler Reporting has been modified to incorporate the City's reporting and inquiry needs, the software will be delivered to the City. During this phase, our team will:

- Perform the data synchronization
- Verify the integrity of data in Simpler Reporting.
- Test all delivered functionality against the City's requirements

Cardon will perform a majority of these tasks, and anticipates using a combination of onsite and offsite resources.

**Training**

Simpler Systems and Cardon will provide training to City staff on an hourly basis as requested by the City.



### City Responsibilities

Our proposal assumes that the City will provide the following on this project:

- A designated project manager that will be the primary point of contact, and who will have the authority to make decisions regarding all aspects of the project
- Sufficient server hardware and Microsoft Windows and SQL Server licenses.

**Simpler Reporting**

Item	Frequency	Price
<b>Simpler Reporting User Licenses</b>	Monthly	\$5,000
Includes unlimited named-user licenses for Simpler Reporting, technical support, and version upgrades, enhancements and bug fixes for server software.		
<b>Professional Services related to Simpler Reporting Enhancements and New Subject Areas or Servers</b>	Hourly	\$165
Planning, Analysis, Development, and Delivery services will be provided at a rate of \$165 per hour plus expenses which will not exceed the City's per diem rate.		

**Pricing Summary**

In summary, we propose to provide the following software/services:

Summary	Estimated Price
Simpler Reporting User Licenses - 12 Months	60,000
Simpler Reporting Enhancements (e.g. dashboard, ERP conversion analysis, etc.) as directed by City staff.	90,000
<b>Total</b>	<b>\$150,000</b>

Professional Services fees will be billed on a time and materials basis. It is estimated that some of the services will be provided onsite at the City, and some services will be provided remotely. Simpler Systems and Cardon will provide Professional Services at a rate of \$165/hour plus expenses which will not exceed the City's per diem rate.

Simpler Systems will provide monthly invoices for expenses and actual hours worked to deliver the services.



## Company

Simpler Systems is a developer and publisher of high performance software that is easy to use. We have diverse skill sets in a variety of markets. We incorporated in 1998 with the vision of creating simple and elegant technology for business problems. We have implemented many applications for local governments, K-12 schools, and higher education. Our systems are simple to use, easy to implement and scale to any size organization. Our Simpler Reporting combines financial experience with extensive software engineering in the interest of elegant, simple, and powerful software.

## Executive Team

### **Rick Schaffer, President and Chief Technology Officer**

Rick is widely recognized as a leading architect and software engineer. He has been a developer of enterprise software for over 20 years. Rick has designed and implemented web-based and client/server systems for financial accounting, budgeting, and payroll departments. He has led a variety of projects for both commercial clientele and government agencies. Rick is known for his ability to understand and solve business process problems with simple yet powerful applications. Rick earned a bachelor's degree in Business Economics at the University of California, Santa Barbara and attended Rensselaer Polytechnic Institute.

### **Brian Fahnestock, Vice President, Business Development**

Brian has been an executive in several large organizations, and brings extensive skills in project management, sales, and marketing. Prior to joining Simpler Systems, Brian was the Chief Business Officer and Vice President of Santa Barbara City College. Brian received a bachelor's degree from the University of Illinois and earned a master's degree at the Navy Postgraduate School in Monterey, California. Brian is also a member of the Board of Directors for the Santa Barbara Metropolitan Transit District.

### **Barry Taugher, Vice President, Partners**

Barry has over 20 years in information technology. He has a broad background in marketing, software development, channel management, and business development. He has been successful at all levels of the industry, from start-ups to the Fortune 200. Mr. Taugher was most recently Vice President of National Marketing for Novacoast, an IT professional services firm, where he directed expansion from a regional firm to the delivery of professional services nationally. Barry has a bachelor's degree in Political Science from the University of California, Santa Barbara.

## Company

Cardon Solutions, LLC provides services to the public sector related to the operation of financial management systems and ERP systems.

## Executive Team

### Caryn Jenney, Manager

Caryn has over 20 years of public-sector experience, having served in a variety of technical roles at consulting firms such as KPMG Consulting, Tier Technologies, and Affinity Source. Ms. Jenney has extensive experience in management and technology consulting, QA and data center management, product support, system integration, mainframe systems programming, and application development. Caryn has participated on projects and/or supported the City's financial management system for over fifteen years. Ms. Jenney earned a B.S. in Management Science from Virginia Polytechnic Institute and State University.

### Donna Wukash, Manager

Donna brings nearly 20 years of experience in the public sector, comprised of four years in the Consulting and Budget Departments of a large county government, and sixteen years with IT consulting companies such as KPMG Consulting, Tier Technologies, and Affinity Source. Her experience includes project management, application support center management, product development and management, management consulting, system integration, and training. Donna has participated on projects and/or supported the City's financial management system for approximately fifteen years. Ms. Wukash attended Purdue University, earning a B.S. in Chemistry and a M.S. in Industrial Administration.