

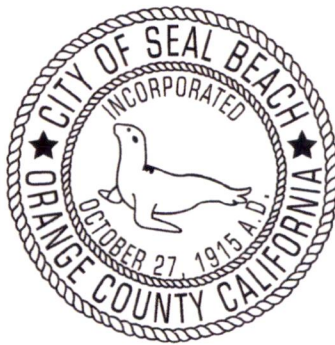
# **PROFESSIONAL SERVICES AGREEMENT**

**Amendment No. 1**

**for**

**Post-Go-Live Transition Services**

**Between**



**City of Seal Beach  
211 - 8th Street  
Seal Beach, CA 90740**

**&**

**Holistic System Integration Solutions  
P.O. Box 6313  
La Quinta, CA 92248  
(760) 861-6532**

This Amendment No. 1, dated December 9, 2024, amends that certain agreement (Agreement) made as of August 26, 2024 by and between the City of Seal Beach (City), a California charter city, and Holistic System Integration Solutions (Consultant), a sole proprietorship (collectively, "the Parties").

## RECITALS

A. City and Consultant are parties to the Agreement, pursuant to which Consultant provides post-go-live professional services to support implementation of the Tyler Enterprise, Permitting and Licensing software system.

B. City and Consultant wish to amend the Agreement for Consultant to extend the executed document from September 1, 2024, for a seven month extension to conclude on June 30, 2025, and to increase the executed agreement for an additional \$15,000 for continued support.

## AMENDMENT NO. 1

NOW, THEREFORE and in consideration of the foregoing and of the mutual covenants and promises herein set forth, the parties agree to amend the Agreement as follows:

Section 1. Section 2.0 (Term) of the September 1, 2024 Agreement is hereby amended for a seven month extension to expire June 30, 2025, to read as follows:

The term of this Agreement shall commence on September 1, 2024 and shall remain in full force and effect until June 30, 2025 unless sooner terminated as provided in Section 5.0 of this Agreement.

Section 2. Section 3.0 (Payment) of the September 1, 2024 Agreement is hereby amended to increase by \$15,000, the contract amount to \$20,000, to read as follows:

City will pay Consultant in accordance with the hourly rates shown on the fee schedule set forth in Exhibit A for the Services but in no event will the City pay more than the total not-to-exceed amount of \$20,000 (twenty thousand dollars) for the Term.

Section 3. All references to the term "Agreement" throughout Sections 1.0 through 35.0 inclusive, of the Agreement are hereby modified to include the this Amendment No. 1, dated December 9, 2024, as if all of those terms are fully set forth therein.

Section 4. Except as expressly modified or supplemented by this Amendment No. 1, all other provisions of the Agreement shall remain unaltered and in full force and effect.

Section 4. The person executing this Amendment No. 1 on behalf of Consultant warrants that he or she is fully authorized to execute this Amendment

No. 1 on behalf of said Party, and that by his or her execution, Consultant is formally bound to the provisions of this Amendment No. 1.

IN WITNESS WHEREOF, the Parties hereto, through their respective authorized representatives have executed this Agreement as of the date and year first above written.

CITY OF SEAL BEACH

By: Patrick Gallegos  
Patrick Gallegos, Interim City Manager

Attest:

By: Gloria D. Harper  
Gloria D. Harper, City Clerk



CONSULTANT: Holistic Systems  
Integration Solutions, a Sole  
Proprietorship

By: Angelica Zarco

Name: Angelica Zarco

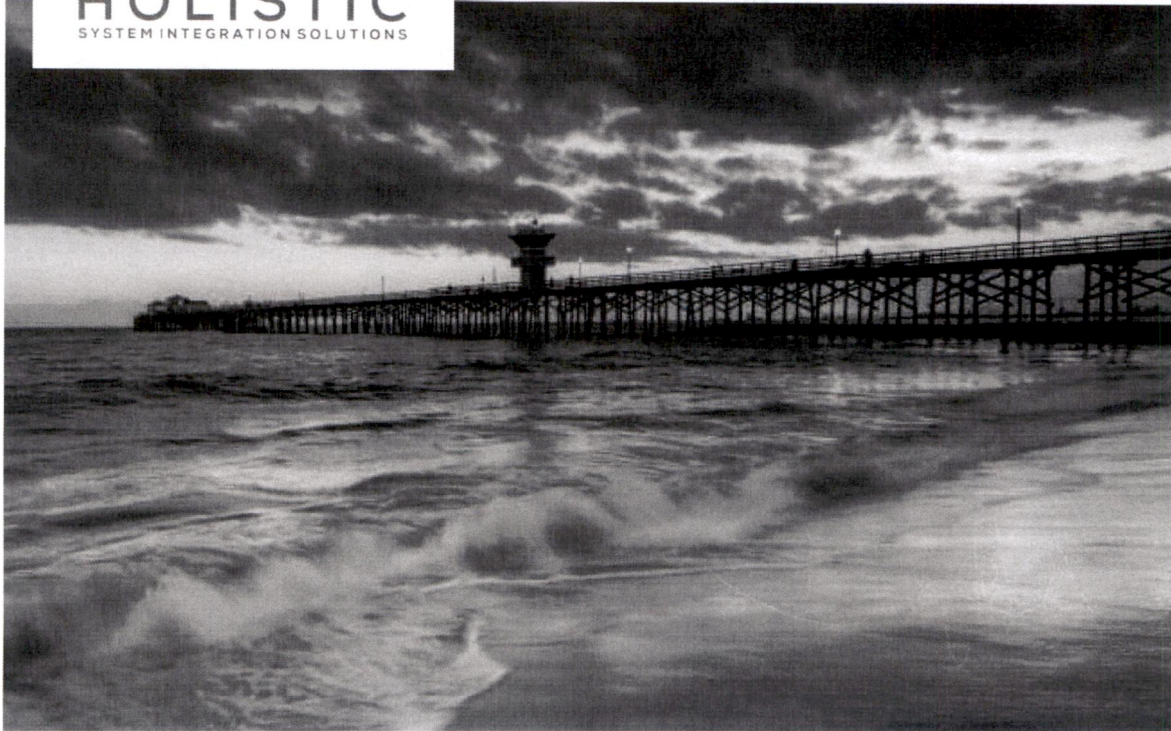
Its: President

Approved as to Form:

By: Nicholas Ghirelli  
Nicholas Ghirelli, City Attorney



**HOLISTIC**  
SYSTEM INTEGRATION SOLUTIONS



**Proposal:**  
**City of Seal Beach**  
**Consulting Assistance for Implementation of**  
**Tyler's EnerGov Civic Services Software**

**Angelica Zarco**

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Office (760) 861-6532  
azarco@holisticsystemint.com

[www.holisticsystem-int.com](http://www.holisticsystem-int.com)



November 4, 2024

Alexa Smittle  
Community Development Director  
City of Seal Beach, California  
[asmittle@sealbeachca.gov](mailto:asmittle@sealbeachca.gov)

**RE: Consulting services for post-implementation support of Tyler's EnerGov, Community Development Software System**

Dear Ms. Smittle,

Holistic System Integration Solutions is pleased to submit this proposal to the City of Seal Beach Community Development Department, to provide post-implementation support of Tyler's, EnerGov Civic Services Software. Implementation of the City's new permitting system occurred on August 19<sup>th</sup>, 2024. The City desires to engage post-implementation support services for a period of up to one (1) year.

Holistic looks forward to working with the City of Seal Beach to develop a model for efficient business operations that safely delivers development services to its customers. Thank you for consideration of our proposal.

Sincerely,

**Holistic System Integration Solutions**



**Angelica Zarco**  
President/CEO

## SCOPE OF WORK

Provide post-implementation support of Tyler's, Enterprise Permitting software system to include the following:

- Configuration/Business Process Integration
- Fee Schedule/Structure configuration
- System Reports Development Coordination (Forms/Documents/Reports)
- GIS Coordination
- Testing
- Develop Standard Operating Procedures (SOP's)
- Develop Training materials
- Ticket creation to report system issues, monitoring and follow through to resolution
- Conduct one-on-one and/or group sessions with City staff
- Remote support services via phone/video conference

# QUALIFICATIONS

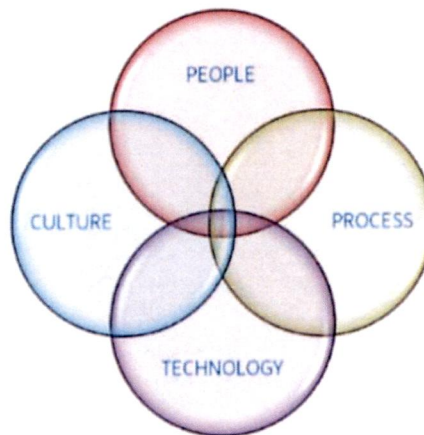
## HOLISTIC SYSTEM INTEGRATION SOLUTIONS

### OUR PURPOSE

Based in Riverside County, **Holistic System Integration Solutions** is dedicated to providing smart holistic solutions for software implementation and process integration.

Holistic's in-depth understanding of land management systems, comprehensive knowledge of municipal land development processes and proven system implementation/integration experience, paired with our client's desires to achieve future system goals and capitalize on their investment while delivering exceptional customer service, ensures seamless and streamlined collaborations.

Holistic has developed streamlined solutions that utilize a holistic approach to system design and integration by balancing four major elements that are key to successful system implementation – **People, Culture, Process, and Technology**. This approach delivers system integration on a global scale while taking-into-account and minimizing adverse impacts to the organization.



### EXECUTION STRATEGY

Our success is attributed to an execution strategy that incorporates the Lean Six Sigma, **DMAIC** (Define, Measure, Analyze, Improve, Control) **method** to software implementation/integration. The DMAIC approach allows them to continually identify and apply improvements to business processes through software system design that result in enhanced system performance.

Change management strategies are also built into our programs to assist with the least impactful introduction of end-users to their new land management environment. This approach is imperative to organizational health.

### SERVICES PROVIDED (all of which may be provided remotely)

- RFP Development
- Software System Implementation (New or Upgrade)
- Software Configuration/Integration
- Workflow Development, Design and Automation
- Fee Schedule/Structure Calculations
- System Reports Development Coordination (Forms/Documents/Reports)
- GIS Implementation Coordination
- System Testing
- Streamlined Strategies for Data Mapping/Migration
- Develop Training Materials and Conduct Staff Training
- Vendor issue creation to report system issues, monitoring and follow through to resolution
- Conduct one-on-one and/or group sessions with staff
- Remote support services via phone/video conference
- On-site and/or remote project management/support services
- Electronic plan review software Implementation/ integration
- Develop Process/Project Action Team's to achieve project goals

- Develop Standard Operating Procedures (SOP's)

- Develop performance metrics and key performance indicators (KPI's) for increased productivity

## Holistic System Integration Solutions Experience

### CITY OF SAN CLEMENTE

The City of San Clemente's Information Technology Division utilized **Holistic System Integration Solutions** to supplement their efforts during a staff transitional period and implementation/integration of a new GIS module. **Holistic's ability to provide uninterrupted services while implementing a complex GIS module to their existing land management system resulted in a successful partnership.** Services provided to the City included the following:

- Review, analysis, coordination, testing and implementation of a new GIS module to their existing land management system.
- Review, analysis, coordination and validation of the City's, County and Fire GIS data and migration into existing land management system.
- Developed Standard Operating Procedures for City Staff use at implementation.
- Developed roadmap and made recommendations to implement electronic plan review.
- Developed reporting methods for Clean Oceans Annual Jurisdictional Runoff report and Park Ranger program.
- Provided configuration and system support services:

### CITY OF MEDFORD (OR)

*"Holistic quickly became a critical element to a successful implementation of a complex system for the City of Medford. The knowledge and resources provided were extremely hardworking and competent. **We could not have achieved success without these resources.**"*

– Barbara Madruga

The City of Medford procured Holistic System Integration Solutions to assist them with a complex implementation of a new software system just three months prior to their scheduled Go-Live date. **Holistic** addressed and fast-tracked resolutions for concerns surrounding their anticipated Go-Live schedule. Our assistance lead to a **successful implementation.** Services provided to the City included the following:

- Conducted analysis of project timeline and task evaluation, identified critical stops and developed plan of action to accomplish scheduled tasks for successful Go-live.
- Conducted business process and workflow analysis, made recommendations for streamlining and standardizing opportunities and configured in system.
- Conducted analysis of TRAKiT system for configuration needs, accuracy and made configuration adjustments in accordance with desired workflows and business processes.
- Conducted data migration analysis and developed streamlined methods for mapping and migration to new system.
- Conducted GIS analysis and made recommendations for effective system implementation
- Developed SOPs and conducted training to staff in all modules

- Implemented mobile inspection platform and conducted training for inspection staff
- Made recommendations for system preparedness and roll-out to public

## CITY OF COACHELLA

**Holistic** conducted an in-depth System Needs Analysis of the City of Coachella's existing land management software system (Eden) and processes surrounding their land development activities which included impacts to water & sewer Utilities and Environmental Compliance Departments. The analysis provided them with the ability to measure existing software system capabilities against newer, more sophisticated systems and identified process improvement/streamlining opportunities which will allow them to make informed decisions about future procurement of a new software system.

Services provided to the City included the following:

- Conducted comprehensive system needs analysis of various systems used, including the City's existing Eden land management system, and evaluated based on capability, efficiency and accessibility in comparison with newer land management systems available in today's market.
- Conducted comprehensive business process review of land development activities and made recommendations for standardizing and streamlining opportunities.
- Coordinated software vendor demonstrations and prepared system cost comparison.
- Provided the City with a menu of short-term, mid-term and long-term next steps and made recommendations for actionable goals based on priority.
- Provided roadmap for actionable items with realistic timelines for execution.

## CITY OF LA QUINTA

The City of La Quinta sought to implement an on-line land management system for the Design & Development Department. **Angelica Zarco** (*Systems Integration Manager*), spearheaded implementation of the City's new land management software system, TRAKiT, which included strategic planning, streamlining, standardizing, implementation and integration of processes and systems for the Design and Development Department. Responsibilities included the following:

- Development, configuration and implementation of the City's software system (TRAKiT) utilized for all development related, business license and Short-Term Vacation Rental application, review, processing and payment activities for both over the counter and online functionality.
- Implemented the City's online, electronic plan review, GIS and mobile inspection platforms.
- Engaged with City Staff to understand complex business processes, developed workflows, identified process improvements, streamlining opportunities, standardized business processes and integrated with relative software.
- Developed Standard Operating Procedures and User Guides and conducted training for all modules.
- Oversaw the City's Short-Term Vacation Rental Program which involved revamping the marketing and branding of the program.
- Development of complex key performance indicators to measure business and system performance.



### **Angelica Zarco – Project Manager/President, Holistic SIS**

Business Process Review, Workflow Development, Streamlining and Standardizing for Improved Business Continuity, Configuration, SOP Development & Training

#### **Certifications**

Intermediate Project Management - Microsoft Project; Lean Six Sigma – Lean Management

Angelica has 14 years of municipal government experience with 10+ years directly related to Community Development. She was also employed as a Project Manager for 3 years with a major Southern California land development company where she managed large-scale tract home development projects. Her experience in both public and private land development sectors has granted her a unique perspective to the land management software implementation and integration process. She is able to utilize her knowledge and experience from behind both sides of the counter to accurately, efficiently and effectively interpret and deploy land management systems based on the critical business needs of cities and customers alike. Angelica was responsible for the successful implementation of the **City of La Quinta's Design and Development Department's land management system**, which included Permit, Project, Business License, AEC and GIS modules. She also implemented electronic plan review, mobile inspection and the eTRAKiT online platform which consisted of 82 land development application types. Angelica developed methods to successfully measure key performance indicators for business process and system performance. The implementation process included:

- Establishing comprehensive strategic plans for implementation / integration of the Department's software system and various project initiatives including project budgets and schedule development / adherence.
- Managing, assigning, and directing activities of various Project Action Teams (PAT's).
- Developing, configuring, and implementing the City's TRAKiT software system
- Conducting stakeholder workshops for eTRAKiT online permitting software.
- Working with City Staff to understand their business processes, developing process workflows, and identifying process improvement opportunities prior to their integration into TRAKiT.
- Developing and implementing standard operating procedures (SOPs) and user manuals, as well as City policies and best management practices (BMP's)
- Conducting effective staff training utilizing SOP's and effective training materials

## References

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## Fee Information

Cost of Services/Hour	Price	Total Project Cost
<b>Time and Materials – Contract Duration (Up to 1 Year)</b>  To be billed in Increments of no less than 30 minutes per task	\$125/hour	\$15,000
<b>TOTAL CONTRACT AMOUNT</b>		<b>\$15,000</b>



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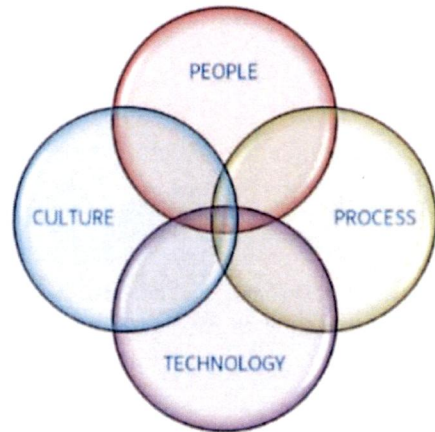
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