



Shireen McSpadden, Executive Director

London Breed, Mayor

To	Homelessness Oversight Commission
Through	Shireen McSpadden, Executive Director
From	Gigi Whitley, Chief of Finance and Administration Edilyn Velasquez, Director, Contracts
Date	March 14, 2024
Subject	Contract Agreement Approval: Hasler Enterprise dba Abelian Contract Lifecycle Management System (CLMS)

<i>Agreement Information</i>	
F\$P#	1000032348
Provider	Hasler Enterprise dba Abelian
Program Name	Contract Lifecycle Management System (CLMS)
Agreement Action	Original Agreement
Agreement Term	May 15, 2024 – May 14, 2029

Agreement Amount

New	Contingency ¹	Total Not to Exceed (NTE)
\$2,184,775	\$655,432	\$2,840,207

Funding Summary

Funding Sources²	100% HHAP 3 State
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The Department of Homelessness and Supportive Housing (HSH) Contracts team requests authorization to enter into a new contract agreement with Hasler Enterprise dba Abelian for the provision of Contract Lifecycle Management System (CLMS) for the period of May 15, 2024 to May 14, 2029. This new agreement is for new services.

Background

HSH is rapidly expanding its efforts to address the ongoing homelessness crisis in the City. These efforts have resulted in an increased number of agreements that the Contracts team must create, amend, and manage. The number of new funding sources available has also resulted in a more complicated budget & purchase order set-up, and invoicing process. Additionally, HSH must conduct program audits and measure provider performance to ensure compliance with agreements and appropriate use of funding.

HSH currently utilizes disparate systems to create, amend, & manage agreements, budgets, invoices, and generate reports. HSH and its contracted providers are challenged with the current system’s lack of integration and automation, restricted data access, and uptime delays. HSH needs a more robust, intuitive, comprehensive, and fully functional system to streamline contracting workflows, meet fiscal

¹ Contingency only applied to FY 24-25 - FY 28-29 budgeted amount.

² The funding sources listed reflect current and future years.

deadlines, fulfill reporting and compliance requirements, and support the ongoing delivery of critical services to the City's unhoused and vulnerable populations.

Services to be Provided

The purpose of the contract is to provide services to implement and maintain an extensible and scalable cloud-based CLMS that will replace HSH's legacy contract management system. Services also include licensing, hosting, maintenance, and technical support.

Selection

Contractor was selected through Request for Proposals (RFP) #140, which is valid until May 14, 2044.

Agreement Materials

- HOC Approval Package
 - Appendix A-1, Services to be Provided
 - Appendix A-2, Services to be Provided
 - Appendix B, Budget



Appendix A-1, Services to be Provided
by
Hasler Enterprise dba Abelian
CLMS SaaS Implementation and Training Services

I. Purpose of Contract

The purpose of this agreement is to provide services to implement and maintain an extensible and scalable Contract Lifecycle Management System (CLMS) to replace the Departments of Homelessness and Supportive Housing's (HSH) current grant and contract management system. The system will allow HSH to automate and streamline current processes to implement best practices, reduce manual and double entry, provide a user-friendly and intuitive interface to improve productivity and efficiency, empower reporting capabilities to address internal and external requirements, interface with other HSH systems to enhance capabilities, and integrate with City's Oracle Identity Access Management (IAM) to implement a single sign-on solution for Authorized Users. The goal of these services is to support the development of a fully integrated and capable solution and support user training for the completion of the project.

II. User Roles

- A. Internal Users: HSH Staff including HSH CLMS System Administrator(s), Contracts, Programs, Fiscal, Budgets, Data & Performance, and HSH Directors and Deputy Directors.
- B. External Users: Contractors, Vendors, and Grantee Providers.

III. System Characteristics

- A. User Access Levels: Contractor shall work with HSH in identifying the accurate access levels for various user groups and defining permissions for all the user levels to enable access to the appropriate features, functions, and data.
- B. User Portals: Contractor shall develop a system that allows authorized users to log into their portals to access the required features, functionalities, data, and information. The authorized users should have the appropriate permission to perform all the essential functions through their portals.
- C. User Interface: Contractor shall develop a system that provides an intuitive and a user-friendly interface that is easy to navigate, productive and provides a seamless user experience with smooth and frictionless design to avoid negative user experience in accessing all the features and functionalities.
- D. Automation and Streamlined Processes: Contractor shall develop a system that reduces manual data entry and eliminates redundant data entry during the development of agreements/amendments and other functionality areas. The system shall allow HSH to configure streamlined business processes and workflows to implement best practices and ensure compliance.
- E. System Administration: Contractor shall develop a system that will allow HSH's Information Technology (IT) staff to serve as CLMS System Administrator(s). The System Administration tasks include, but not limited to the following:

1. System Administrator shall be able to provide required configuration, customization, automation, administer templates, manage users and licenses, perform the system administration tasks, and troubleshoot issues.
 2. System Administrator shall have full access to the features and permissions of the system and shall be able to configure and customize all the configurable components to meet the existing and evolving requirements of the department.
 3. System Administrator should be able to import data from external sources.
 4. System Administrator shall be able to access and export the database schema and entity relationship diagram to be useable for HSH's data warehouse requirements.
 5. System Administrator shall be able to secure the system to ensure users only access what is appropriate for their user roles.
- F. Flexible, Agile and Scalable System: Contractor shall develop a system that supports expanded functionalities, data, and reporting capabilities to fulfill the growing needs of HSH and support an increased volume of users in the future. The system shall be configurable and customizable within the purview of the System Administrator to support evolving functionalities, data, and reporting requirements.

IV. **Description of Services**

Contractor shall work with HSH to plan, develop, and implement a CLMS. The contractor shall deliver the system using agile methodology and shall be responsible for delivering high quality deliverables and satisfactory services. The contractor shall map the project tasks and activities to support the integrated processes during the agile project life cycle. Project tasks shall include, but are not limited to the following:

- A. Project Initiation and Planning: Contractor shall provide project initiation and planning services upon start of the contract. Contractor shall develop the following:
1. Project Initiation and Management Plan, a Regular Project Status Reporting Plan, and a System Release Plan;
 2. Configuration/ Design/ Development/ Implementation Plan;
 3. Delivery Review & Acceptance Plan, a System Testing Plan, and a Training Plan;
 4. Requirements Traceability Plan;
 5. Release Readiness Evaluation Plan, and a Deployment Plan;
 6. System Defects Resolution Plan;
 7. Risk Assessment and Mitigation Plan, in partnership with HSH;
 8. Communication Plan; and
 9. System Maintenance & Support Plan and a Resource Plan.
- B. Project Discovery, Analysis and Design: Contractor shall be responsible for in-depth discovery and analysis to gain full understanding of all the system requirements and features. Contractor shall be responsible for building the backlog documentation with the support of HSH. Contractor shall work with HSH on a periodic basis for backlog refinement to review and update requirements during the entire project lifecycle. Contractor shall work with HSH to develop the following artifacts:

1. Discovery Plan and a Current State Analysis Report;
 2. Functional Design Document;
 3. Backlog Documentation;
 4. Backlog Refinement Plan and conduct periodic backlog refinement;
 5. System Architecture ;
 6. Data Structure Design, Database Schema, and Entity Relationship Diagram;
 7. Technical Design Document;
 8. Data Migration requirements to support data migration; and
 9. Data Integration Plan and Design
- C. Configuration and Development: Contractor agrees to minimize the use of custom coding. Contractor shall provide a full disclosure to, and obtain written consent from, the HSH Director of Information Technology or their designee, prior to using any custom coding. Contractor shall configure and develop the following capabilities as part of the CLMS:
1. Agreement workflow module to allow HSH staff to administer templates, use automated and customizable templates to draft agreements and necessary appendices from start to finish and route for internal and external approvals.
 2. Contract Budget workflow module that will allow HSH to draft, manage, modify, review, and approve budgets.
 3. Invoicing module to allow HSH providers to submit and resubmit invoices with corrections and HSH staff to review, reject, and approve invoices.
 4. Program Monitoring module to allow HSH to audit programs mandated by agreements to ensure providers are adhering to contractual and programmatic requirements.
 5. Reporting and Dashboard module to allow users to create reports outside canned reports and tailored reports/dashboards with specified criteria and information.
 6. Tracking and Documenting module that will allow HSH staff to track all the agreement components' status, progress, and changes at any given time. The Tracking and Documenting module shall also allow tracking and comparing budget history to stay informed regarding how budgets have progressed over time. The module shall also document communication to enable HSH staff to respond to internal and external requests for future reference.
 7. Data Collection and Record Management module that will allow HSH to collect and archive data and documents/files to manage agreements and maintain vital information in the system to be populated and utilized for supporting numerous processes and mechanisms.

8. Communication, Notifications, and Alerts module that will allow HSH to send/receive communications. The system should send notifications to alert about deadlines, due dates, next steps, pending actions and missing or expiring information as configured in various processes and workflows during all aspects of agreement management, invoicing, performance monitoring, compliance management, reporting, and other aspects.
9. Integration with Online Navigation and Entry (ONE) System and other systems to synthesize information using underlying information, store documents & records, collect signatures from required parties and implement single-sign on solution.
10. Other functionalities as needs arise through the course of the project including developing the strategy and specifications to migrate data and records, enabling quick search functions for quickly accessing information and records and set up views to access information.

Detailed requirements for each functionality are listed in [Exhibit A: CLMS Requirements Workbook](#). More detailed instructions and information on features and functionalities are available in the attachments included in the Request for Proposal (RFP) #140 CLMS:

[Attachment 6: CLMS Data Fields](#)

[Attachment 7: CLMS Requirements Workbook](#)

[Attachment 9: CLMS List of reports](#)

[Attachment 10: New Agreement and Amendment Workflow Diagram](#)

[Attachment 11: Overview of HSH's CLMS](#)

[Attachment 12: Process Flowcharts](#)

[Attachment 13: Wireframes](#)

- D. Testing: Contractor shall provide the traceability of deployed features derived from the system requirements. Tasks include, but are not limited to:
 1. Contractor shall develop the testing plan, delivery review & acceptance plan and get approval from HSH;
 2. Contractor shall ensure all the software and document deliverables meet the acceptance criteria and HSH's satisfaction level;
 3. Contractor shall be responsible for setting up the testing environment for HSH to conduct thorough testing;
 4. Contractor shall be responsible for enabling HSH to conduct testing in the production environment after deployment;
 5. Contractor shall perform testing of individual units of the system (small piece of code of configuration), assuring that part of the system works as expected;
 6. Contractor shall perform testing to ensure deliverables meet acceptance criteria;
 7. Contractor shall perform performance testing to ensure the system works as expected during high workload;
 8. Contractor shall perform system testing to ensure all the units and components work together as expected and sign off on the complete integrity of the system.

System testing shall be completed prior to the start of User Acceptance Testing (UAT);

9. Contractor shall set up HSH's user acceptance testers to perform UAT to ensure the system satisfies the business requirements; and
 10. Contractor shall conduct and facilitate desk sessions to provide support to user acceptance testers.
- E. Deployment: Contractor shall be responsible for successful deployments to the production environment after the features are fully tested and accepted in the test environment.
1. Contractor shall ensure the services work as expected in the production environment;
 2. Contractor shall provide technical knowledge transfer and mentoring to HSH staff for all deployment activities; and
 3. Contractor shall prepare training documentation and conduct training prior to deployment activities.
- F. Documentation and Training: Contractor shall create and maintain a comprehensive training program and provide training to all CLMS users, including HSH CLMS System Administrator(s). Tasks include, but are not limited to:
1. Contractor shall design, develop, and deliver HSH Internal User training curriculum;
 2. Contractor shall design, develop, and deliver External Provider User training curriculum;
 3. Contractor shall design, develop, and deliver HSH CLMS System Administrator training curriculum;
 4. Contractor shall update training materials as system changes are made;
 5. Contractor shall record and maintain a log of user training attendance and ensure all the users get the required training;
 6. Contractor shall be responsible for providing satisfactory training and training materials; and
 7. Contractor shall complete Department of Public Health (DPH) privacy training and other trainings required by ONE System.
- G. Data Migration: Contractor shall work with HSH to develop a plan, identify the scope, design a process, and create technical specifications to support the import and migration of the needed data and records from existing legacy systems. Contractor shall develop a post-migration testing plan to validate the quality of migration process and verify the migration completion of the required data and records.
- H. Administration Tasks: Contractor shall conduct and facilitate the following administration tasks:
1. Project kick-off meeting with HSH Staff to initiate the project;
 2. Project planning meetings with HSH Staff to determine the course of work and plan the project deliverables;
 3. Discovery meetings with HSH Staff to review and analyze the current system;

4. Backlog preparation meetings with HSH Staff to list work to be completed;
5. Backlog refinement meetings with HSH Staff to refine work to be completed;
6. Sprint planning meetings with HSH Staff to prioritize and plan the sprint work;
7. Mid-sprint review meeting with HSH Staff for clarification and feedback during the sprints;
8. Sprint demonstration/review meetings with HSH Staff to demonstrate the completed items at the end of every sprint;
9. Sprint retrospective meetings with HSH Staff to discuss lessons learned and improvements in processes;
10. Biweekly project status and risk review meetings with HSH Staff to track the progress and log any potential risks;
11. Executive meetings once a month with HSH's Steering Committee to review project status and decisions to be made;
12. Daily stand-up meetings within the contractor team to review completed work, planned work, and blockers;
13. Project closeout meetings with HSH Staff to close the project successfully; and
14. Meetings with HSH Staff as needed to follow standard system delivery practices and to ensure the quality delivery and timely completion of deliverables.

Contractor shall provide meeting minutes to include the key items discussed during the meeting, any decisions made and the next steps. These meeting minutes shall provide records of each meeting.

V. Key Personnel:

Contractor project leadership team will consist of Key Personnel and subcontractors, as applicable, according to the Key Personnel tab of the Appendix B, Budget. Contractor agrees that it shall not transfer or reassign the individuals without the express written agreement of the City, which agreement shall not be unreasonably withheld. Should such individual or individuals in the employ of Contractor no longer be employed by Contractor during the term of this Agreement, Contractor shall make a good faith effort to present to City an individual with greater or equal qualifications as a replacement subject of City's approval, which approval shall not be unreasonably withheld.

VI. Reporting Requirements

- A. On a weekly basis, Contractor shall submit status reports that cover overall project status, scope changes (if any), risks (including risks of delays), actual delays, issues (including personnel issues) and defects, action plan, decisions to be made, and any other relevant items;
- B. On an as needed basis, Contractor shall report new tasks or activities that may arise during the project to HSH for approval before performing those tasks/activities; and
- C. On a monthly basis, Contractor shall submit reports that cover all areas of work completed as described in the Appendix B, Budget in support of expectations outlined in Section IV. Description of Services in this Appendix. This report shall also include any variations that may occur from agreed-upon milestones and deliverables.

Appendix A-2, Services to be Provided
by
Hasler Enterprise dba Abelian
CLMS SaaS Application & Hosting Services

I. Description of the SaaS Application and Hosted Services

“SaaS Application and Hosted Services” include the following services:

- A. Software: Use of Contractor’s configured Software operating on hosted equipment located at facilities and/or any Data Centers as further outlined under Section II (SaaS Data Centers) of this Appendix A-2. This includes:
1. Contractor shall provide secure hosting services, maintenance services, licenses, and technical support to host and maintain the SaaS Application securely and enable all users to access the services securely and seamlessly. Per Section III (Scope of Work) of the RFP, Contractor may subcontract one or more elements of the project, including but not limited to the following approved subcontractors: Launchpad, Formstack, and/or Carahsoft/Salesforce. This Agreement is the prime contract, with Contractor ultimately responsible for ensuring all the deliverables are met directly by its staff or through its approved subcontractor(s).
- B. Third-Party Software: (Launchpad, Salesforce, Formstack):
1. Providing integration and configuration of certain third-party software required to operate the SaaS Software, including Launchpad, Formstack, and Salesforce, and other bundled third-party software packages required to support the operation of the SaaS Software.
 2. Inclusion of regular Software and Contractor-supplied third-party software updates, patches and fixes as scheduled by Contractor.
- C. Box Integration: Contractor’s system shall integrate with Box (City’s cloud-based content management system) to allow authorized users to easily store and manage documents and records. City shall utilize Box as a storage platform.
- D. Online Navigation and Entry (ONE) System Integration: Contractor’s system shall integrate with ONE System (City’s Homeless Management Information System, HMIS) to synthesize information for analysis and reporting purposes using existing APIs.
- E. DocuSign Integration: Contractor’s system shall integrate with DocuSign to collect electronic signatures from required parties and execute agreements.
- F. Integration with HSH’s additional databases: Contractor’s system shall integrate with HSH’s additional databases, to the extent commercially reasonable, to synthesize information for analysis and reporting purposes.
- G. Oracle Identity and Access Management (IAM): Hosted Service(s) must support multi-factor authentication using the current Security Assertion Markup Language (SAML) standard. Contractor shall provide technical support, at no additional cost, so that the City can successfully implement a single sign-on solution for Authorized Users with City’s Oracle IAM. Contractor shall assist City in determining the timeline to implement this solution.

- H. Encryption Requirement: Systems in Production must have a length of at least 256 bits.
- I. Access Control: Contractor shall provide access to and use of an encryption service known as “Shield” for City management of Authorized Users, access rights and other similar role-based controls as they pertain to the SaaS Application(s). Method will be published through Contractor portal and be made available to Authorized Users with elevated privileges. City shall pay for and maintain active licensing pursuant to the terms and conditions as required by Third Party Software in order to have access to and use of the “Shield” tool.
- J. Audit Trails: Salesforce Field Service Audit Trail feature allows for comprehensive tracking of up to 60 specific data fields per Object (In Salesforce, database tables are called Objects). It records every modification made to these fields, capturing the nature of each change, the identity of the individual who made it, and the date and time when it occurred. Salesforce maintains this Field History Tracking data for a standard duration of 18 months, after which it is archived by Salesforce.
- K. Backup and Exports: Contractor’s system shall allow users to perform a manual and/or scheduled backup of their data using Salesforce’s Data Export Service, which can be configured to run at a desired time interval and allow to export data into a set of CSV files. The data export shall include standard and custom objects records, documents, and attachments. This export shall be set up to export all data or only selected Object’s data as needed.
1. Contractor’s system shall allow users to restore their data from the recycle bin within 15 days of deletion.
 2. Contractor’s system shall allow System Administrator(s) to restore all User’s deleted data from the recycle bin within 15 days of deletion.
 3. Contractor’s system shall allow City to pay for and use Salesforce’s paid data recovery service (\$10,000 per recovery) as a last-resort service to recover data within three months of deletion.
 4. Contractor shall provide multiple Developer Sandboxes per City’s request at no additional cost. The Developer Sandboxes shall be copies of Production Metadata (current Org Configuration, such as object definitions, page layouts, workflows, processes, and Apex classes).
 5. Contractor’s system shall allow backup and recovery of Metadata via replicating Production to Sandboxes up to once a day as needed. Contractor’s system shall allow to push Metadata changes from a Sandbox to Production as needed.
 6. Contractor’s system shall enable System Administrator(s) to create a Sandbox, conduct refreshes and push changesets as needed.
- L. SaaS Environments: The SaaS Application and Hosted Services shall be hosted in a certified and secure Tier-3 data hosting center.
1. Multiple Developer Sandboxes available for backup and recovery of Metadata as well as for development and testing. Contractor and City shall have access to separate sandboxes that can be used for different purposes.

2. A Partial Copy Sandbox available to City and Contractor as a test environment for Quality Assurance and User Acceptance Testing. This Sandbox shall also be a copy of Production Meta-Data and a sample of City's data.
3. A Production environment available to City and Contractor as a Go-Live environment.
4. Contractor shall provide full System Admin and Configuration Access to HSH. The level of access shall not differ from the level of access that Contractor uses to configure the system. HSH will be able to utilize this access as needed to update and configure the system, including the use of codes as needed. City is responsible for any costs associated with the update or configuration of the system on City's end. City is responsible for the cost of any fixes required that are a result of City's configuration and code changes.

M. Hosting Components included in the Service – Diagram:

During the Discovery, Analysis and Design phase, Contractor shall provide the City with a diagram that illustrates which Hosting components Contractor maintains and which components the City maintains, if any. The diagram must specifically reflect the security boundaries of the City build, including the Contractor boundaries of responsibility.

- N. Security and Compliance: Upon request of the City, Contractor shall provide a description on how Contractor will address emerging malware or equipment flaws that may impact City Data, and inform the City about level of risk and options to mitigate.
- O. Periodic Meetings to Address Security and/or Other Hosting and/or Application Issues or Proposed Changes: At minimum twice annually, the parties shall meet to discuss and share information regarding security and/or other hosting/application issues. In advance, the parties shall create an agenda that each believes will be useful and will identify required participants and/or designees.
- P. Reporting: Contractor shall provide electronic notifications within 24 hours of discovery and subsequent monthly reporting of any security incidents or service health issues that could potentially affect the hosted application for Salesforce related issues. Contractor shall provide electronic notifications within 2 hours of discovery and subsequent monthly reporting of any security incidents or service health issues on Contractor's end that could affect the hosted application. In the event of a breach, Contractor shall follow the procedures set forth in Section 13.1.4 of the Agreement. The instructions to request Incident report are provided at <https://help.salesforce.com/s/articleView?id=000391517&type=1>
- Q. Availability of SaaS Services: Contractor (or its Hosting Service contractor) shall host the SaaS Services on computers owned or controlled by Contractor (or its contractor) and shall provide the City with access to SaaS environments described in this Appendix with SaaS Application and data via Internet-access to use according to the terms herein:
 1. Hosted System Uptime: Other than Scheduled SaaS Maintenance Services as outlined in sub-section 4, emergency maintenance described below, Force

Majeure as described in the Agreement and lack of internet availability as described below, Contractor shall provide uptime to the SaaS Application and Hosted Service to achieve a 99.861% Service Level Availability.

2. Scheduled SaaS Maintenance:
 - a. Contractor shall make best efforts to conduct Scheduled SaaS Maintenance during the following hours: Saturdays between 12 AM (Pacific Time) and 8 AM (Pacific Time), with the same exclusions noted in subsection 1, above. The preferred system Maintenance window is between Saturday and Sunday. After the Instance is assigned, a specific time is shared, and the window is 4 hours.
 - b. All maintenance status and other details shall be communicated by email to subscribed users and available at <https://status.salesforce.com/current/maintenances>. Scheduled SaaS Maintenance shall not exceed an average of 4 hours per month over a twelve (12) month period except for major scheduled upgrades.
3. Unscheduled SaaS Maintenance: Contractor shall use commercially reasonable efforts to prevent more than one (1) hour of continuous down time during business hours in any month for which unscheduled SaaS maintenance is required.
4. Emergency Maintenance: If Force Majeure Events occur, Contractor shall take any emergency maintenance that Contractor, in good faith, determines is necessary or advisable to prevent, remedy, mitigate, or otherwise address actual or potential harm, interruption, loss, and/or threat to uptime and/or the City Data. Contractor shall use best efforts to provide advance written notice of such emergency maintenance to City as soon as is reasonably possible.
5. Notice of Unavailability: In the event there will be more than thirty (30) minutes down time of any SaaS or Hosted Service components for any reason, including but not limited to, Scheduled SaaS Maintenance or emergency maintenance, Contractor shall provide notice to Authorized users via publication of a temporary splash page and/or email that indicates that the site is temporarily unavailable with expected time to restoration to normal operations. Contractor shall also provide advanced e-mail notice to hom-secalerts@sfgov.org which will include at least a brief description of the reason for the downtime and an estimate of the time when City can expect the site to be up and available. The incidents shall also be reported at <https://status.salesforce.com/current/incidents>.
6. System Administration: Contractor shall perform system administration duties as required to maintain the service levels described in this agreement and to facilitate timely restoration of City's data and operations, if necessary, following unanticipated interruptions of the Hosted Services. Contractor will restrict live-production Hosted Software unavailability to a planned, standard maintenance window which is mutually defined and agreed. This standard maintenance window is to perform any planned changes or modifications of a material nature where risk of or actual City user downtime is expected.

7. Notice of Unplanned Outage: For unplanned outages, to remedy a significant security or performance problem, Contractor will provide a minimum of 48-hours' notice. The City shall be provided a written Root Cause Analysis (RCA) and action plan within two weeks of the resolution of any outage/degradation in service.
- R. Changes in Functionality: During the term of this Agreement, Contractor shall not reduce or eliminate functionality in SaaS Services. Where Contractor has reduced or eliminated functionality in SaaS Services, City, in its sole election, shall: (i) have, in addition to any other rights and remedies under this Agreement or at law, the right to terminate this Agreement and be entitled to a return of any prepaid unearned fees after engaging in reasonable and good faith effort to find an alternative resolution to the reduced or eliminated functionality with Contractor; or, (ii) determine the reasonable value of the reduced or eliminated functionality and Contractor shall immediately adjust the Services fees accordingly on a prospective basis. Where Contractor increases functionality in the SaaS Services, such functionality shall be provided to City without any increase in the Services fees

II. SaaS Data Centers

- A. Control: The method and means of providing the Services shall be under the exclusive control, management, and supervision of Contractor, giving due consideration to the requests of City. Contractor, or any previously approved subcontractor, shall provide the Services (including data storage) solely from within the continental United States and on computing and data storage devices residing in the United States.
- B. Data Center Standards:
1. Contractor's Data Centers shall have fully redundant and diverse network paths to City endpoints. Data Centers shall be located in geographically different seismic zones characterized by the lowest predicted chance of damage.
 2. Only authorized personnel may access the Data Centers using at least two-factor authentication. Video surveillance systems must record all movements, 24 hours a day, inside and outside the perimeter of the Data Centers.
 3. Environmental systems must monitor/detect temperature, humidity, fluid leaks, fire/smoke/particulate and have accompanying suppression systems. Fire suppression systems should be dry pipe. Power should be fully conditioned to avoid spikes and other aberrations that can damage equipment. Temporary power units, such as generators, must be in place to support SaaS Services in the event of a power outage for up to three calendar days, and fuel replenishment contracts must be in place to keep temporary power operational for longer periods.
 4. The hosting facility shall adhere to data center Tier classification levels, performance standards, and requirements defined by Uptime Institute, Inc.
- C. Location: The SaaS Applications will be hosted at the following hosting facilities located within the continental United States. The primary and the back-up data centers must be situated in distinct geographic regions to enhance data resilience and business continuity in the event of a localized disaster, ensuring that the SaaS

application can be quickly restored from the backup systems located in a separate, unaffected region. The intent is to minimize the risk of simultaneous disruptions to both primary and back-up data centers due to regional events such as natural disasters, political instability, or other unforeseen circumstances.

- D. High Availability, Performance, Capacity, and Security: Contractor shall assume full responsibility for the physical components of the Hosted platform. A tiered architecture should be used to support services such as Tier III level for the primary data center and Tier II level for the back-up data center. Hosted platform should be able to scale up based on City's needs with minimal notice. For enhanced security in the Hosted platform, tools such as firewalls, intrusion detection and prevention, threat management, and patch and vulnerability management are used.
- E. Technical Hardware Upgrades and Updates: Contractor's Hosted Services shall include life cycle management of the Contractor's Facility's infrastructure systems, including but not limited to power, cooling, leak and particulate detection, fire/smoke detection and suppression, and physical security.
- F. Replacement Hosted Provider: In the event Contractor changes the foregoing Hosted Provider, Contractor shall provide City with prior written notice of said change and disclose the name and location of the replacement Hosted Provider. The replacement Hosted Provider shall be a reputable Hosted Provider comparable to Contractor's current Hosted Provider, and said replacement Hosted Provider shall be located within the continental United States. The Contractor will be required to update one of the following two documents to City's Office of Cybersecurity team for review and approval:
1. **SSAE 18 SOC-2, Type 2 Report**: Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy (management's description of a service organization's system and the suitability of the design and operating effectiveness of controls, aka SOC-2 Type 2); or
 2. **City Cyber Risk Assessment (CRA) Questionnaire**: City Cybersecurity Risk Assessment questionnaire based on industry standards.
- G. Notice of Change: If the location of the Data Center used to host the SaaS Application is changed, Contractor shall provide City with written notice of said change at least ten (10) days prior to any such change taking place. Contractor shall disclose the address of the new facility, which shall be within the Continental United States. The Data Centers referenced above are subcontractors that must be approved by City.
- H. Subcontractors: Contractor shall not enter into any subcontracts for the performance of the Services, or assign or transfer any of its rights or obligations under this Agreement, without City's prior written consent and any attempt to do so shall be void and without further effect and shall be a material breach of this Agreement. Contractor's use of subcontractors shall not relieve Contractor of any of its duties or obligations under this Agreement. Salesforce, Launchpad, and Formstack are approved subcontractors under this Agreement.

- I. Business Continuity and Disaster Recovery (BCDR): Contractor shall maintain a high availability configuration in the primary data center, with a mirrored instance of the City production system and supporting infrastructure in the secondary data center. Contractor shall maintain a standard procedure that governs the management of business continuity events. A disaster recovery test plan must be reviewed and exercised at least annually. Upon reasonable notice from City, disaster recovery testing documentation shall be made available to the City. Contractor will provide City's HSH Chief Information Security Officer with access to review BCDR plan. Contractor will maintain the BCDR environment with high availability infrastructure to support automatic failover in the event the production Hosting environment suffers a failure.

III. System Monitoring

Contractor shall provide 24x7 monitoring of the security, availability, and performance, including response times, of the data centers. Monitoring also includes intrusion and threat detection, and event correlation. Contractor's Technical Support is a primary point of contact for monitoring, investigating, and responding to issues related to the systems hosted under the Hosted Services. Contractor will provide City with access to the web-based monitoring tools as they become available, and/or copies of uptime reports as requested by City at no cost to the City.

IV. SaaS Maintenance Services

- A. The SaaS Software maintained under this Agreement shall be the SaaS Software set forth in Appendix A-1 to this Agreement.
- B. The following SaaS Maintenance Services are included as part of this Agreement:
1. Contractor Software Version Upgrades, Software Revisions and Patches: Contractor shall provide and implement all SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software Patches to ensure: (a) that the functionality of the SaaS Software and Services, as described in the Documentation, is available to Authorized Users; (b) that the functionality of the SaaS Software and Services is in accordance with the representations and warranties set forth herein, including but not limited to, the SaaS Software and Services conforming in all material respects to the specifications, functions, descriptions, standards, and criteria set forth in the Documentation; (c) that the Service Level Standards can be achieved; and (d) that the SaaS Software Services work with the non-hosted browser version.
 - a. Planning: Contractor shall assist the City with the planning and logistics of upgrades and updates.
 - b. Technical Assistance: Contractor shall provide technical assistance regarding release notes, new functionality, and new application workflows.
 - c. Deployment: Deployment of these revisions will be mutually agreed upon between Contractor and City.

- d. Software Releases: Release of Software revisions as defined will be conducted on a schedule as determined by Contractor. Contractor shall provide no less than a thirty (30) calendar day prior written notice of when any such revision is scheduled to be released. City will be granted a fifteen (15) calendar day evaluation window to review release documentation regarding software modules being impacted and general revision changes.
- e. Testing: After the evaluation period, Contractor shall conduct a deployment of the revision to the City test environment. The Software deployment will be scheduled in writing five (5) calendar days prior to actual deployment activities. As part of the upgrade activities within the Test Environment, Contractor may provide nominal testing to ensure all systems are functional and the revision deployment was successful. Post deployment activities include an e-mail or portal post to serve as written notification that this service has been completed. City shall have forty-five (45) calendar day test window in which City has ability to test and raise issues with Contractor. Test environment deployment activities will be conducted during a mutually agreed-to time window and may not necessarily align with the production maintenance windows as described within this document.
- f. Severity 1 and Severity 2 Incident Correction: If a SaaS Severity Level 1 or Severity Level 2 Issue is identified and appropriately triaged and classified by both Contractor and City during the test environment deployment test window, Contractor shall correct the SaaS Issue. The severity of a SaaS Issue will be initially defined by the City and confirmed by Contractor. Until the SaaS Issue has been resolved, the Severity Level may be raised or lowered based on Contractor's analysis of impact to business. If the SaaS Issue can be corrected and can be redeployed within the remainder of the deployment test window, City will have an additional five (5) testing days in which to evaluate and further test for the SaaS Issue resolution. If the SaaS Issue cannot be corrected within the remainder of the test window, Contractor will deploy immediately upon availability with as much notice as practicable. City will be allowed an additional five (5) testing days to evaluate the correction post the test window if desired.
- g. Testing Suspension: If at any time during the testing window City identifies the presence of multiple SaaS Severity Level 1 or Severity Level 2 Issues that can be shown to materially impact City ability to continue testing, City may in writing elect to suspend testing until corrections for the SaaS Issues can be provided. Contractor will deploy corrections immediately upon availability with as much notice as practicable. Upon release of corrections, City will

have five (5) calendar days to commence the testing within the then available remaining testing window.

- h. Software Promotion: Contractor shall promote revision from Test Environment to Production and Back-up environments after the provided test window has elapsed. The Software promotion will be scheduled in writing five (5) calendar days prior to actual deployment activities. As part of the promotion activities within the Production and Back-up environment, Contractor will do testing to ensure the bug fixes and new features in the release function correctly and the contractor will also conduct a baseline system test / smoke test to make sure all systems are functional and still function as designed. The smoke test / baseline test to be developed by the Contractor but reviewed and signed off by HSH. Post promotion activities include an e-mail or portal post to serve as written notification that this service has been completed. At the point of e-mail or portal posting, the new revision will be considered “in production” and supported under the maintenance service terms described here within.
 - i. Documentation: In support of such SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software patches, Contractor shall provide updated user technical documentation reflecting the SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software patches as soon as reasonably practical after the SaaS Software Version upgrades, SaaS Software Revisions and SaaS Software Patches have been released. Updated user technical documentation that corrects SaaS Software Errors or other minor discrepancies will be provided to Contractor’s customers when available.
 - j. Training: Contractor must provide standard training using Contractor’s upgrade tools and provide ongoing knowledge transfer to the City.
2. Third-Party Software Revisions: At its election, Contractor will provide periodic software revisions of Third-Party Software with the SaaS Software without further charge provided the following conditions are met: (i) the Third-Party Software revision corrects a malfunction or significant publicly disclosed security threat in the Third-Party Software that affects the operation or ability to provide secure use of the SaaS Software; and (ii) the Third-Party Software Revision has, in the opinion of Contractor, corrected malfunctions or a significant security threat identified in Contractor’s Technology System and has not created any additional malfunctions; and (iii) the Third-Party Software revision is available to Contractor. City is responsible for obtaining and installing or requesting installation of the Third-Party Software revision if the Third-Party Software was not licensed to City by or through Contractor. Contractor Software revisions

provided by Contractor are specifically limited to the Third-Party Software identified and set forth in this Appendix A-2.

- C. Response to SaaS Issues: Contractor shall provide verbal or written responses to SaaS Issues identified by City in an expeditious manner. Such responses shall be provided in accordance with the Target Response Times defined under Section VI (24 x 7 Technical Support - Software).
- D. SaaS Software Maintenance Acceptance Period: Unless otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, City shall have a twenty (20) business day period to test any maintenance changes prior to Contractor introducing such maintenance changes into production. If the City rejects, for good cause, any maintenance changes during the SaaS Software Maintenance Acceptance Period, Contractor shall not introduce such rejected maintenance changes into production. At the end of the Maintenance Acceptance Period, if City has not rejected the maintenance changes, the maintenance changes shall be deemed to be accepted by City and Contractor shall be entitled to introduce the maintenance changes into production.
- E. SaaS Hardware: Contractor shall use commercially reasonable efforts to ensure that all hardware (including servers, routers, and other related equipment) on which the SaaS Application is deployed are attached to back-up power systems sufficient to maintain the site's availability for so long as any power outage could reasonably be expected to occur, based on the experience of Contractor at its deployment location and consistent with the Tier rating of the Data Center required under Section (II)(C) of this Appendix.

V. **City Responsibilities**

- A. Contact for SaaS Issues: City shall provide Contractor with timely notification of any SaaS Issues or SaaS Software Errors by either of these methods:
 1. Contacting Contractor's Customer Support at 657.234.1004
 2. By entering the problem on Contractor's Service Portal. Notifications can be submitted through the Contractor's Service Portal. This is the preferred method by which to contact Contractor.
 3. If City cannot readily access Contractor's Service Portal, City may contact Contractor at 657.234.1004 (the number listed above).
- B. Support for Problem Investigation: City shall support all reasonable requests by Contractor as may be required in problem investigation and resolution.
- C. SaaS Incident Manager: Designation of Point of Contact. City shall assign an individual or individuals to serve as the designated contact(s) for all communication with Contractor during SaaS Issue investigation and resolution.
- D. Discovery of SaaS Software Errors: Upon discovery of a SaaS Software Error, City agrees, if requested by Contractor, to submit to Contractor a listing of output and any other data that Contractor may require in order to reproduce the SaaS Software Error

and the operating conditions under which the SaaS Software Error occurred or was discovered.

VI. 24x7 Technical Support - Software

Authorized Users will make Technical Support requests 24/7 by calling or submitting a request via Contractor’s Service Portal. The Technical Support staff shall work with City to establish the severity level. Severity Level 1 and 2 Incident items will be addressed 24/7/365. Severity Level 3 and 4 Incident items will be addressed during the standard business hours of 6:00 a.m. – 6:00 p.m. US Pacific Time (“support period”).

Incident Severity Level	<i>Target Response Time</i>
<p>Severity Level 1: Requires immediate attention– Critical production functionality is not available or a large number of users cannot access the SaaS Application. Causes a major business impact where service is lost or degraded and no workaround is available, preventing operation of the business.</p>	<p>Request Response Time: 15 minutes. Request Resolution Time Target: < 2 hours. Maximum Permitted Request Resolution Time: < 12 hours <i>City shall be entitled to a Service Credit of 15% of the Monthly Licensing Fee paid for each failure to achieve resolution within the Maximum Permitted Request Resolution Time during the support period. If Fees are paid annually, the 15% shall apply to 1/12 of that annual fee</i></p>
<p>Severity Level 2: Requires priority attention – Some important production functionality is not available, or a small number of users cannot access the system. Causes significant business impact where service is lost or degraded and no workaround is available; however, the business can continue to operate in a limited fashion.</p>	<p>Request Response Time: 30 minutes Request Resolution Time Target: < 4 hours Maximum Permitted Request Resolution Time: < 48 hours <i>City shall be entitled to a Service Credit of 10% of the Monthly Licensing Fee paid for each failure to achieve resolution within the Maximum Permitted Request Resolution Time during the support period. If Fees are paid annually, the 10% shall apply to 1/12 of that annual fee</i></p>
<p>Severity Level 3: Requires attention – There is a problem or inconvenience. Causes a business impact where there is minimal loss of service and a</p>	<p>Request Response Time: 1 hr. Request Resolution Time Target: < 8 hours</p>

Incident Severity Level	<i>Target Response Time</i>
workaround is available such that the system can continue to operate fully and users are able to continue business operations.	Maximum Permitted Request Resolution Time: < 96 hours <i>City shall be entitled to a Service Credit of 5% of the Monthly Licensing Fee paid for each failure to achieve resolution within the Maximum Permitted Request Resolution Time during the support period. If Fees are paid annually, the 5% shall apply to 1/12 of that annual fee.</i>
Severity Level 4: There is a problem or issue with no loss of service and no business impact.	Request Response Time: 4 hr. Request Resolution Time Target: < 96 hours Maximum Permitted Request Resolution Time: < 7 days

- A. Service credit escalation: In the event of a Severity Level 1 issue that is not resolved sufficiently quickly as determined in City’s sole discretion, City may escalate the problem to Contractor’s Chief Technology Officer.
- B. Root cause analysis: Following the resolution of a Severity Level 1 OR Level 2 incident, Contractor will discuss with City the cause of the failure, the actions Contractor took to resolve the failure, a timeline of the event and the actions Contractor plans to take to prevent such failure from recurring, and, if requested, Contractor will provide City a written summary of such discussion. Contractor will, on request, provide detailed documentation of the root cause analysis and preventative actions taken or planned with clear dates for completion of the action(s).

VII. 24/7 Technical Support – Hosting

Hosting availability is defined as a user’s ability to launch and utilize Hosted Application on the Hosted System without interruption or delay in any month (24 hours per day, 7 days per week, 30 days per month). For any month during which actual Hosting availability is less than 99.861%, the City will be entitled to a service credit on the next billing cycle as follows:

Uptime	Unscheduled Downtime in Minutes (based on 43,200 minutes/month)	Penalty Credit per Month
Greater than or equal to 99.861%	Less than or equal to (one hour 25 seconds) 60 minutes/month	0% Credit

Less than 99.861 % - 99.800%	Between (one hour 25 seconds) 60 minutes/month and (one hour 26 minutes 56 seconds) 87 minutes/month	15%
Less than 99.800% - 98.000%	Between (one hour 26 minutes 56 seconds) 87 minutes/month and (14 hours 29 minutes 23 seconds) 869 minutes/ month	35%
Less than 98.000%	More than 869 minutes/ month	100%

- A. Performance Degradation Service Level: Performance Degradation is defined as when the services on the production system do not maintain a response rate of two seconds per screen refresh, lookup, searching, or query. The two second response rate will be achieved for 99.861% of the time in a month (24 hours per day, 7 days per week, 30 days per month). The cumulative performance degradation should amount to no more than 4 hours of response time greater than 2 seconds in a given month. Contractor understands and agrees that Service Credits will be due to City should the Contractor's production environment experience Performance Degradation.
- B. Request for Cure: The City will notify the Contactor in writing or by e-mail of Performance Degradation (Request for Cure). Should Contractor fail to cure degraded performance within 48 hours of a City's Request for Cure, then that shall be deemed a Substandard Performance Day.
- C. Service Level Reporting: Monthly, Contractor shall provide reports to City describing the Hosting performance as compared to the service level standards described above. The reports shall be in a form agreed-to by City, and, in no case, contain no less than the following information:
1. actual performance compared to the service level standard;
 2. the cause or basis for not meeting the service level standards described herein;
 3. the specific remedial actions Contractor has undertaken or will undertake to ensure that the service level standards described herein will be subsequently achieved; and,
 4. any Service Credit due to City.
- D. Key Performance Indicators: The City and Contractor agree to review and discuss providing the City with the ability to measure performance metrics that are meaningful to the City's operations. The City and Contractor shall collaborate and design application-specific key performance indicators (each a "KPI") that provide the City with a way to measure overall system health (KPI Report).

Upon mutual agreement of the City and Contractor, KPIs will be decided on an annual basis and reviewed quarterly or monthly at an agreed upon frequency. If the City detects any Hosting response time issues which are having a significant negative impact on the City's day to day business operations, including transactions not included in any measured KPI, the City may request Contractor to initiate diagnostic procedures to review the reported performance concern and to correct such impact.

Summary Tab

Hasler Enterprise Dba Abelian	
Contract Lifecycle Management System (CLMS)	
May 15, 2024 - May 14, 2029	
New Agreement	
F\$P Contract ID: 1000032348	
CLMS Implementation & Training Project Amount	\$729,386
Licensing (Initial and Ongoing)	\$1,298,139
Maintenance and Operations	\$157,250
<i>Subtotal</i>	\$2,184,775
Contingency (30%)	\$655,432
Total Contract	\$ 2,840,207

Task Name	Duration	New Start	New Finish	Amount
Milestone 1 - Project Initiation and Planning	38d	05/15/24	07/10/24	
Sprint 1 - Project Initiation and Management Plan, Regular Projects Status report and System Release Plan	2w	05/15/24	05/29/24	\$9,562.50
Sprint 2 - Configuration/Design/Development/Implementation Plan	2w	05/29/24	06/12/24	\$9,562.50
Sprint 3 - System Testing, Training Plan and Requirements Traceability Plan	2w	06/12/24	06/26/24	\$9,562.50
Sprint 4 - System Maintenance & Support Plan, and Resource Plan System Defects Resolution Reports Plan Communication Plan and Risk Assessment Delivery Review & Acceptance Plan	2w	06/26/24	07/10/24	\$9,562.50
Total Amount for Milestone 1				\$38,250.00
Milestone 2 - Discovery, Analysis and Design	56d	07/11/24	09/27/24	
Sprint 5 - Discovery	3w	07/11/24	08/01/24	\$26,350.00
Sprint 6 - Discovery and Current State Analysis Report	3w	08/02/24	08/23/24	\$26,350.00
Sprint 7 - Functional Design Document, Backlog documentation	3w	08/23/24	09/13/24	\$26,350.00
Sprint 8 - Data Integration Design, Technical Design Document, and System Architecture, Data Structure Design, Database Schema, and Entity Relationship Diagram	2w	09/13/24	09/27/24	\$26,350.00
Total Amount for Milestone 2				\$105,400.00
Milestone 3 - Configuration and Development - Core Functionality	89d	9/27/2024	2/14/2025	
Sprint 9 - Salesforce Org set-up, Package Installation and Initial Grant Management Out of box Object Set up	3w	09/27/24	10/18/24	\$25,980.68
Sprint 10 - Grant Management configuration Grant Object and Key metrics Financial Tracking Data Grant Status and Codes Funding Streams Configuration Contract Budget Workflow Memo Core Configuration (template and workflow configuration)	3w	10/18/24	11/08/24	\$25,980.68
Sprint 11 - Grant Management configuration Contract Budget Workflow Agreement Workflow Appendix A Core Configuration (process workflow configuration)	2w	11/08/24	11/27/24	\$25,980.68
Sprint 12 - Grant Management configuration Agreement Workflow Budget: Configuration of Budget Object Grant Budgets Invoice / Budget Amount Tracking and Allocations HUD Budget Core Configuration (Process workflow configuration) Appendix C Core Configuration (Process Workflow configuration)	3w	12/02/24	12/23/24	\$25,980.68
Sprint 13 - Grant Management configuration Invoicing: Configure Invoice Object Submission and Invoice Tracking Invoiced and Budget allocation HUD Budget Core Configuration (Process workflow configuration) Non-HUD Budget Core Configuration (Process Workflow configuration) Template administration portal access for Contract Superusers	3w	01/02/25	01/23/25	\$24,452.41
Sprint 14 - Purchase Order Tracking, Accounting Codes Purchase Order Set up Purchase Order Request Process Automation and Guided Flow	3w	01/24/25	02/14/25	\$29,801.37
Total Amount for Milestone 3				\$158,176.50
Milestone 4 - Configuration and Development	55d	02/14/25	05/02/25	
Sprint 15 - Case Management Commun Intake Contact Object configuration (Notes And Activities) Program Configuration Service Set-up	3w	02/14/25	03/07/25	\$27,284.74
Sprint 16 - Case Management Eligibilities and Program Matching Enrollments and follow-ups Program Monitoring Internal communication Setup CLMS Administration Setup and Review	3w	03/07/25	03/28/25	\$27,285.00
Sprint 17 - Migration Plan and Data Migration Support	2w	03/28/25	04/18/25	\$5,100.00
Sprint 18 - Reports & Dashboard	2w	04/18/25	05/02/25	\$34,105.92
Total Amount for Milestone 4				\$146,276.76
Milestone 5 - Configuration and Development	112d	05/02/25	10/10/25	

Sprint 19 - Provider Grant Portal	3w	05/02/25	05/23/25	\$24,327.52
Sprint 20 - Provider Grant Portal & Formstack CODB Increase Process Templates PDF Generation	3w	05/23/25	06/13/25	\$24,327.52
Sprint 21 - Formstack Templates PDF Generation	3w	06/13/25	07/07/25	\$33,830.45
Sprint 22 - Guided Contract and Budget Flow; Cash Advance Request Functionality Carry Forward Provider Process Provider Cash Advance Process Provider Budget Modification Process Provider Budget Revision Process Provider Invoice Management External Communications, Notifications and Automations Set-up	3w	07/07/25	07/28/25	\$33,830.45
Sprint 23 - Migration Plan, Data Migration Plan Analysis and Documentation	2w	07/29/25	08/12/25	\$5,100.00
Sprint 24 - Integrations Box Integration Integration with One system	3w	08/13/25	09/03/25	\$28,800.55
Sprint 25 - Integration and DocuSign Integrate HSH Databases DocuSign Configuration	3w	09/04/25	09/25/25	\$28,800.55
Sprint 26 - Reports & Dashboards Objective Monitoring Setup (Oracle Identity Access Management (IAM) to implement a single sign-on solution for Authorized Users - Abelian will provide guidance)	2w	09/26/25	10/10/25	\$34,210.57
Total Amount for Milestone 5				\$150,526.50
Milestone 6 - Project Training - Internal Staff	29d	10/10/25	11/21/25	
Sprint 27 - Training Plan and Training Sessions	2w	10/10/25	10/24/25	\$8,925.00
Sprint 28 - Training Manuals, Guides, and Materials Release	2w	10/24/25	11/07/25	\$8,925.00
Sprint 29 - Onboarding and documented evidence of successful end-user training (HSH Internal Users)	2w	11/07/25	11/21/25	\$5,100.00
Total Amount for Milestone 6				\$22,950.00
Milestone 7 - User Acceptance Testing Release 1	22d	11/21/25	01/02/26	
Sprint 30 - User Acceptance Testing, Support and Feedback Production Deployment Plan	3w	11/21/25	12/12/25	\$17,000.00
Sprint 31 - System Defect Resolution Reports and System Documentation Production Deployment (Pos UAT approval)	2w	12/12/25	01/02/26	\$17,501.50
Total Amount for Milestone 7				\$39,601.50
Milestone 8 - Project Training Second Round - Provider Portal	30d	01/02/26	02/13/26	
Sprint 32 - Training Plan and Training Sessions	2w	01/02/26	01/16/26	\$3,825.00
Sprint 33 - Training Manuals, Guides, and Materials Release	2w	01/16/26	01/30/26	\$4,430.63
Sprint 34 - Onboarding - Documented Evidence of Successful End-User Training	2w	02/02/26	02/13/26	\$2,550.00
Total Amount for Milestone 8				\$10,805.63
Milestone 9 - Go-Live	49d	02/17/26	04/24/26	
Sprint 35 - User Acceptance Testing Release Readiness Evaluation and Report - Deployment Plan	3w	02/17/26	03/10/26	\$17,000.00
Sprint 36 - Migration Plan, Data Migration Plan Analysis and Documentation	2w	03/11/26	03/25/26	\$5,100.00
Sprint 37 - System Defect Resolution Reports and System Documentation	2w	03/26/26	04/09/26	\$17,501.50
Sprint 38 - Final Training, Update Training Materials, Guides and Release Material (HSH Internal Users and Providers)	2w	04/10/26	04/24/26	\$12,527.30
Go Live Date		04/24/26	04/24/26	
Total Amount for Milestone 9				\$52,128.80
Milestone 10 - Implementation Close Out	11d	04/27/26	05/11/26	
Sprint 39 - Documented Implementation Project Close Out	2w	04/27/26	05/11/26	\$5,270.00
Total Amount for Milestone 10				\$5,270.00
Total Project Amount				\$729,385.69

Maintenance & Operations

Maintenance and Operations					
	FY 25-26	FY 26-27	FY 27-28	FY 28-29	Total
Task	May, 12 2026 - June 30, 2026	July 1, 2026 - June, 30 , 2027	July 1, 2027 - June 30, 2028	July 1, 2028 - May 14, 2029	
Technical Support as described in the Appendix A-2, including System Enhancements and System Administration	\$ 8,500.00	\$ 51,000.00	\$ 51,000.00	\$ 46,750.00	\$ 157,250.00
Total amount is for an estimate of 300 hours per year. \$170 per hour. Abelian will only bill HSH for hours used.					

Key Personnel

Abelian Key Personnel			
Name	Title	Phone Number	Email Address
Diana Roque	Director of Delivery - Senior Project Manager	(562)396-1326	diana@abelian.us
Bryan Hasler	Solution Architect	(949)339-8002	bryan@abelian.us
Raffiel Newsome	Junior Project Manager	NA	raffiel@abelian.us
Marty Pott	Senior Salesforce Consultant	NA	marty@abelian.us
Deepthi Gade	Junior Solution Architect/Technical Lead	NA	deepthi@abelian.us
Swapna Tumma	Developer	NA	swapna@abelian.us
Alec Ngheim	Developer	NA	alec@abelian.us
Teja Reddy	Quality Assurance Tester	NA	teja@abelian.us
TBD	Business Analyst	NA	

Approved Subcontractors

	A	B	C	D
1	DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING			
2	APPENDIX B, BUDGET			
3	Document Date	5/15/2024		
4	Contract Term	Begin Date	End Date	Duration (Years)
5	Current Term	5/15/2024	5/14/2029	5
7	Program	Contract Lifecycle Management System (CLMS)		
8				
9	Approved Subcontractors			
10	Launchpad			
11	Salesforce			
12	Formstack			
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Approved Subcontractors

	A	B	C	D
1	DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING			
2	APPENDIX B, BUDGET			
3	Document Date	5/15/2024		
4	Contract Term	Begin Date	End Date	Duration (Years)
5	Current Term	5/15/2024	5/14/2029	5
31				
32				
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45	Contract year			
46	FY begin date			
47	FY end date			
48	Document date			
49	Extension Year			