

39. Approve first amendment to agreement with Bitfocus, Inc., increasing the amount by \$9,486 for a new total of \$463,938, for data analysis tool license and related technical assistance, and take related actions ()



County of Santa Cruz Board of Supervisors

Agenda Item Submittal

From: Human Services Department

Subject: Approve Amendment to Agreement with Bitfocus, Inc. for Data Analysis Tool License

Meeting Date: February 11, 2025

Formal Title: Approve first amendment to agreement with Bitfocus, Inc., increasing the amount by \$9,486 for a new total of \$463,938, for data analysis tool license and related technical assistance, and take related actions

Recommended Actions

1. Approve first amendment to agreement (Contract No. 25C4452) with Bitfocus, Inc., increasing compensation by \$9,486, for a new total of \$463,938, for an additional Looker™ data analysis tool license and related technical assistance; and
2. Authorize the Director of Human Services to sign the amendment.

Executive Summary

The Human Services Department (HSD) recommends the Board of Supervisors (Board) approve an amendment to an agreement with Bitfocus, Inc. to increase the contract amount by \$9,486 to \$463,938 through the end of the contract term, June 30, 2025. The increase in funding will provide one additional Looker™ data analysis tool license and related technical assistance for the Housing for Health (H4H) Division for business intelligence queries and reporting.

Discussion

Bitfocus, Inc. is the administrator of Santa Cruz County's homeless Continuum of Care's (CoC) Homeless Management Information System (HMIS), a federally required computerized record-keeping system that captures information about people experiencing or at-risk of homelessness within the area. The CoC uses HMIS data to improve housing and services, identify patterns and monitor trends over time, and enhance inter-agency coordination, amongst other uses.

Approval of the amendment to Contract No. 25C4452 with Bitfocus, Inc. will provide an additional Looker™ data analysis tool license and related technical assistance, giving Santa Cruz and Monterey counties the capacity to appropriately share data about the Recurso de Fuerza program funded by the County of Monterey and operated within Santa Cruz County.

Financial Impact

Funding is available within the approved FY 2024-25 Human Services Department budget from the U.S. Department of Housing and Urban Development. Approval of this agreement will not require a new allocation of County General funds.

Contract No. 25C4425 Bitfocus, Inc., Amendment One

- 391200 - 62381 – WHHUDHM5 – WH017

Strategic Initiatives

Operational Plan - Operational Excellence

Submitted By:

Randy Morris

Recommended By:

Carlos J. Palacios, County Administrative Officer

Artificial Intelligence Acknowledgment:

Artificial Intelligence (AI) did not significantly contribute to the development of this agenda item.

DS



FIRST AMENDMENT TO AGREEMENT Contract No. 25C4452

This Amendment to the Contract, which is effective on the date it is fully executed, is between the COUNTY OF SANTA CRUZ, hereinafter called COUNTY, and BITFOCUS INC, hereinafter called CONTRACTOR. The parties hereto agree to amend Contract 25C4452 by the changes as follows:

A. Page 1, Section III titled “COMPENSATION” of the Contract, is deleted and replaced with the following:

III. COMPENSATION

In consideration for Bitfocus providing the Clarity Service, the County of Santa Cruz agrees to pay Bitfocus as follows: Payment not to exceed **\$463,938** through **June 30, 2025**, to be paid monthly, processed for payment after receipt and approval of monthly invoices, and as specified in Attachment **B Amendment One: County of Santa Cruz System Administration Product and Services Description**; and Attachment **C Amendment One: Fee Schedule/Budget**.

B. Page 1-2, Section V titled “AGREEMENT STRUCTURE” of the Contract, is deleted and replaced with the following:

V. AGREEMENT STRUCTURE

1. The Master Agreement consists of this document and identified attachments below that contain additional terms for Services. Should a conflict arise between the language of this Master Agreement and any attachment to this agreement, the language in the body of this agreement controls. Each attachment as identified below is made a part of the Agreement and is incorporated herein by reference.
2. This Master Agreement includes the following attachments:
 - Attachment A, Amendment One:** Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule
 - Attachment B, Amendment One:** County of Santa Cruz System Administration Product and Services Description
 - Attachment C, Amendment One:** Fee Schedule/Budget
 - Attachment D:** County of Santa Cruz Human Services Data Privacy and Security Agreement.
 - Attachment E:** Bitfocus – Disaster Recovery Plan (2021)
 - Attachment F:** Bitfocus – Security: Data Privacy and Security Features Plan (2020)

C. Attachment A – Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule of the Contract is deleted and replaced with Attachment A, Amendment One – Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule, which is attached hereto and incorporated herein by reference. All references to “Attachment A – Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule”, are amended to read “Attachment A, Amendment One – Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule.”

D. Attachment B – County of Santa Cruz System Administration Product and Services Description of the Contract is deleted and replaced with Attachment B, Amendment One – County of Santa Cruz System Administration Product and Services Description, which is attached hereto and incorporated herein by reference. All references to “Attachment B – County of Santa Cruz System Administration Product and

Services Description of the Contract” are amended to read “Attachment B, Amendment One – County of Santa Cruz System Administration Product and Services Description.”

E. Attachment C – Fee Schedule/Budget of the Contract is deleted and replaced with Attachment C, Amendment One – Fee Schedule/Budget, which is attached hereto and incorporated herein by reference. All references to “Attachment C – Fee Schedule/Budget” are amended to read “Attachment C, Amendment One – Fee Schedule/Budget.”

F. All other existing provisions of the Contract not specifically addressed by this Amendment shall remain unchanged and in full force and effect.

FIRST AMENDMENT TO AGREEMENT
Contract No. 25C4452

On behalf of County of Santa Cruz:

DocuSigned by:
Randy Morris 2/11/2025
By: _____
SIGNED D1FB7B7500084B1...

Randy Morris, Director
PRINTED

On behalf of Bitfocus, Inc.

DocuSigned by:
Jeff Ugai 12/19/2024
By: _____
SIGNED 4AA7CC0A8DC7484...

Jeff Ugai, Chief Operating Officer
PRINTED

Bitfocus, Inc.
548 Market St #60866
San Francisco CA 94104
(800)594-9854

Approval as to form:

Signed by:
Arthur G. Wille 12/18/2024

FD318C222C994D0...
County of Santa Cruz, Office of the County Counsel

Approval as to insurance:

Signed by:
Gina Occhipinti Borasi 12/19/2024

E4EADC5BA53B4DB...
County of Santa Cruz, Risk Management

DISTRIBUTION:

- County of Santa Cruz Human Services Department
- Auditor-Controller-Treasurer-Tax Collector
- Risk Management
- Bitfocus, Inc.

Attachment A, Amendment One: Clarity Human Services Scope of Work and “Software as a Service” (“SaaS”) Fee Schedule

Quote Reference: 20200716-104302227

I. Background

This Attachment A, consisting of this document and any other documents listed below, is part of and governed by the terms and conditions of the Master Agreement for Services between Bitfocus and Santa Cruz. In the event of a conflict between the provisions contained in the Master agreement and those contained in Attachment A, the provisions in the Master Agreement shall prevail.

Bitfocus and Santa Cruz mutually agree to the following “Software as a Service” (or “SaaS”) Scope of Work:

II. Service Description

Bitfocus agrees to provide authorized end users (“Users”) access to and use of its Clarity Human Services application (the “Clarity Community Service”) subject to the following terms and conditions:

1. Number of Users
 - a. Included User Licenses: Access via the internet will be available to Santa Cruz with access rights transferable to different users by Santa Cruz
 - b. Adding User Licenses: Authorized users may add additional user licenses via the application interface or by contacting Bitfocus. Additional licenses will be invoiced monthly according to the fee schedule.
 - c. Minimum License Count: For each license type, the total number of user licenses must be equal or greater to the minimum number of contracted licenses as outlined below.
2. Number of Organizations
 - a. Agency License Requirements: Each Agency configured in the Clarity Community Service requires an Agency License.
3. Features and Functionality
 - a. Full access to all documented features: Santa Cruz will have full access to and use of all documented features provided in the most recent version of the Clarity Community Service. Add-on services may be available and may require additional fees or agreements.

III. Support Description

1. Product Support
 - a. *Limited to Named Users*: Phone, email, and chat support is provided to current and intended licensed users. This support is provided to users for the explicit purpose of assisting Santa Cruz to understand and utilize existing system features and capacities.
 - b. *Support Response Time*
 - i. Bitfocus will be available during normal business hours for both Operational and Technical support. Standard customer support hours are from 5:00 a.m. to 6:00 p.m., PST, Monday through Friday.
 - ii. Unless specific arrangements are made, after hours and weekend help desk support will not be available. These calls may require contacting an on-call representative who will be able to assist or making arrangements to provide needed assistance. An afterhours contingency plan can be arranged through a duly executed support agreement.

2. Continuity of Service

- a. Bitfocus shall make the Clarity Community Service available continuously twenty-four (24) hours a day, seven (7) days a week, and guarantee continuous service between the hours of 5:00 a.m. to 9:00 p.m. PST during the common Monday to Friday workweek. Bitfocus guarantees, in accord with the remedies stated below, that the Clarity Community Service will be available with a monthly uptime percentage of at least 99.9% during any monthly billing cycle. "Available" means the Clarity Community Service shall be available for access and use by Santa Cruz.
- b. Outage time is defined as the length of time elapsed from when Bitfocus is notified of the problem to the point of time that the problem is remedied. Remedies for outage time longer than these parameters will be a refund or credit equal to one hundred (100) percent of the cost of the percent of outage time (calculated as percent outage out of total charge for month of outage). Requests for such remedies must be made within ten (10) business days of outage time. These remedies will not be available in cases where:
 - i. Santa Cruz did not notify Bitfocus of the inability to transmit or receive data.
 - ii. Outage time is caused by acts of omission by Bitfocus' customers or their end users.
 - iii. Failure of equipment or applications that are not owned or controlled by Bitfocus.
 - iv. "Acts of war or god" and other circumstances beyond the control of Bitfocus.
 - v. Reasonably scheduled and/or pre-announced service maintenance with at least five (5) business days' electronic notice.
- c. Enhanced availability standards and guarantees can be arranged for additional cost.

3. Infrastructure Requirements

- a. Web Browser Requirements: The Clarity Community Service requires the latest release of one of the following web browsers: Microsoft Internet Explorer, Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari.
- b. Minimum Hardware Requirements: Device hardware must meet or exceed the recommended hardware requirements for the Operating System Windows 10 and web browser.
- c. System Requirements: Unless otherwise agreed in writing, Santa Cruz will use or provide equipment compatible with the Clarity Community Service and Bitfocus network and facilities. Santa Cruz will bear the cost of any additional protective apparatus reasonably required to be installed because of the use of Bitfocus' network or facilities by Santa Cruz, lessees or assignees.
- d. Bandwidth: For each user connecting over a given line there must be at least 20 Kbps of bandwidth available for the user. This means that if a given site has 20 users, there would need to be at least 400 Kbps of bandwidth available to access Services. County must be sure to take into account any other traffic that may be using the same connection. Other traffic would include that used by email, web access, and web serving.
- e. Performance: Santa Cruz acknowledges that the minimum system requirement may result in minimum system performance. Service Provider will not be responsible for unreliable or low performance resulting from Santa Cruz technological infrastructure.
- f. Non-interference with maintenance and upgrading of facilities and resources: Santa Cruz' use of the Services provided herein and any equipment associated therewith will not:
 - i. Interfere with or impair Services over Bitfocus' network or facilities;
 - ii. Cause damage of any nature to Bitfocus' assets;
 - iii. Be used to frighten, abuse, torment or harass another;
 - iv. Create hazards to property or persons.
- g. Special Services: Invoices and payments for any Services beyond those specified in this Agreement will be negotiated and reflected in a duly executed separate written agreement from these standard monthly services.

- h. Initiation of Services: As there is an existing instance for the Santa Cruz HMIS, start-up fees are not applicable to this agreement.

IV. Product and Services Description and Fee Schedule

ITEM & DESCRIPTION
Licensing: Enterprise Seats Includes access and operation at the Enterprise level per each seat.
Licensing: Enterprise Seats above 150 expansion – one time set up fee
Licensing: Manager Seats Includes Enterprise level access and operation, with the addition of ability to customize agency preferences, including services and programs of the selected agency
Looker™ Support Hours Invoiced as utilized monthly
Licensing: Administrator Seats Includes Enterprise and Manager level access and operation with the addition of System Administration management functions.
Licensing: Additional Seats <ul style="list-style-type: none"> • Enterprise Seats: \$48.41/month +\$175 one time set up fee per license • Manager Seats: \$54.64/month +\$250 one time set up fee per license • Administrator Seats: \$163.91/month +\$300 one time set up fee per license
Add-On: Data Analysis (Standalone) Access to advanced Data Analysis functionality via a standalone version of the data analysis tool (looker.clarityhs.com) in addition to embedded access from within the application itself; includes access to our Data Analysis API.
Add-On: Data Analysis (Embedded) Access to the Clarity Human Services Data Analysis tool from within the Clarity Human Services application (i.e., santacruz.clarityhs.com).

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Add-On: Daily Automated MariaDB¹ Backups and SFTP Server Transfer

Ongoing daily automated transfer of Santa Cruz HMIS database to SFTP server maintained by County of Santa Cruz Information Services Department (ISD) for Santa Cruz's use in custom queries and report building.

1. Daily back up and automatic transfer of raw SQL data from specified tables of the santacruz.clarityhs.com database into ISD SFTP server.
2. Back up and transfer shall be full point in time backups and not differential backups.
3. Transfer to occur daily in the mornings.
4. Backup shall match Housing and Urban Development (HUD) compliant schema and include any custom fields implemented in the santacruz.clarityhs.com database.
5. Maintenance of daily back up and automatic transfer processes.
6. Maintain privacy, security, and data integrity of automated transfer process.
7. Provide basic (i.e., Help Desk) and advanced (ex. Developer) technical support for Santa Cruz County, including advanced decision support, and guidance re: connections using the MariaDB backup data set.
8. When possible, provide reasonable notice (5 business days) to HSD of any changes to Bitfocus database schema.
9. It will be the responsibility of the County to ensure SFTP access, security, sufficient storage space, and to comply with all federal, state and local policies related to storing and/or sharing of Santa Cruz HMIS data under the authority of the Continuum of Care/Homeless Action Partnership. Should Bitfocus change its database schema, it will be up to the County to update its own processes to handle the new schema.
10. Extensive troubleshooting or ad hoc requests related may require additional paid Scope of Work.

Licensing: Agency

Annual licensing for an Agency Seat within the Santa Cruz HMIS

Training Site License

Access to a standalone training site for Santa Cruz users.

Platform License: Clarity Human Services

Base licensing for the Santa Cruz HMIS instance

Data Integration Maintenance

On-going maintenance and support of current integrations

Add-On: Data Integration Tool (DIT)

Allows for importing HUD XML and CSV files into the Clarity Human Services platform. Supports the import of custom XML-schema files, as well.

Also includes:

- Migration site for testing
- Embedded Looker license for migration site (if already paying for Looker in live site)
- 1 copy of live site data to migration site for testing (no cost); additional copies \$500 each
- Help Center documentation
- Help Desk assistance for support using the DIT

Note: Access to the embedded and standalone versions of the data analysis tool are licensed separately and may be added to any Enterprise, Manager or System Administrator License.

¹ [MariaDB Backup and Restore Overview \(https://mariadb.com/kb/en/backup-and-restore-overview/\)](https://mariadb.com/kb/en/backup-and-restore-overview/)

Attachment B, Amendment One: County of Santa Cruz System Administration Product and Services Description

I. Served Population

Bitfocus shall provide services to:

1. Current and prospective Santa Cruz HMIS partner agencies and end users (users)
2. Designated Santa Cruz HMIS leadership
3. County of Santa Cruz partner departments and contractors

II. Product and Services Description

Item & Description Admin Tier 300 (<i>system size of up to 300 licenses</i>)
<p>A. Community Administration</p> <p>Serve as spokesperson for Santa Cruz HMIS at the direction of the Santa Cruz Continuum of Care (CoC). Serve as a link between the CoC and the US Department of Housing and Urban Development on Santa Cruz HMIS and related issues. Maintain previously developed public web page to support the Santa Cruz HMIS.</p> <p>Provided as a package for a set monthly fee that includes, but is not limited to, the following:</p> <ol style="list-style-type: none"> 1. Maintenance of a public-facing web site to support the Santa Cruz HMIS. <ol style="list-style-type: none"> 1.2. Additional related services provided as part of Infrastructure Support; 2. Attendance at meetings and public events to communicate information about the Santa Cruz HMIS and participate in meetings, as requested by Santa Cruz; <ol style="list-style-type: none"> a. Including, but not limited to, meetings related to such items as By Name Lists, Reports, Performance Measures, and Coordinated Entry; 2. Assistance with outreach and relationship building with community partner agencies, businesses, and individuals to expand the use and effectiveness of the Santa Cruz HMIS; 3. Communicate information between Santa Cruz HMIS partner agencies and Santa Cruz HMIS leadership.
<p>B. Agency Management</p> <p>Assist partner agencies in setting up new programs in Santa Cruz HMIS. Support agencies in configurations and customizations of Santa Cruz HMIS workflow.</p> <p>Provided as a package for a set monthly fee that includes, but is not limited to, the following:</p> <ol style="list-style-type: none"> 1. Manage user accounts for the Santa Cruz HMIS; 2. At Santa Cruz's direction, manage records of current Santa Cruz HMIS user agreements, consent forms, interagency sharing agreements, and related documentation; 3. Provide on-boarding and consultation to community partners regarding system usage, policies, and other pertinent information; 4. Facilitate forums and other opportunities to provide feedback, communicate updates to the Santa Cruz HMIS, and deliver training support to lead contacts at each participating agency; 5. Setup, configure and administer programs, projects, and services in the Santa Cruz HMIS, as requested by Santa Cruz; 6. Manage and modify the Client Profile, Enrollment, and Exit Screens in the Santa Cruz HMIS, per Santa Cruz specifications.
<p>C. Technical Support and Help Desk</p> <p>Direct end user support for all licensed end users, including support for local policies and workflows. Setup Programs and Service for new or existing agencies to allow Agencies to appropriately enter client data within their configuration. Provide analysis and guidance on best practices and models to create efficient program management workflow. Direct, in-application access to help desk and knowledge base for all users.</p>

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Manage the Help Desk trouble ticket system and respond to user issues via phone, email, and online chat channels specific to the Santa Cruz HMIS
2. Provide technical support staff to assist and support users with all Santa Cruz HMIS functionality.
3. Provide a quarterly summary of Help Desk requests, actions to resolve them, and the final status of actions on requests.

D. Training and Professional Development

Live user trainings and workshops, on-demand training and certifications delivered via our learning management system (LMS).

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Design, develop, and deliver new user training curriculum (pre-recorded quiz based)
2. Oversee provision of County-designated privacy policy training, or work with Santa Cruz HMIS leadership to design, develop and deliver comparable training content
3. Work with Santa Cruz to develop an annual training plan to be updated as needed in collaboration with County to reflect emerging training needs. Training shall include:
 - 3.1. Unique training per program type, such as webinars on housing, shelter, problem solving, coordinated entry, outreach, and analysis
 - 3.2. Training for new program implementation (i.e., addition of standard programs such as new buildings or shelters) and functionality deployment, except where training is specific to new services or projects
 - 3.3. Periodic general user refresher trainings to existing users as agreed upon with County; and
 - 3.4. Enhanced training for user groups that Santa Cruz deems require more support
 - 3.5. Provide all necessary training collateral
 - 3.6. Create a training timetable, as approved by Santa Cruz
 - 3.7. Communicate training schedule and materials to ensure successful user training
 - 3.8. Update training materials as Santa Cruz HMIS system changes are made
 - 3.9. Record and maintain a list of user training attendance
4. Bitfocus shall provide training to Santa Cruz and related Santa Cruz Veterans Administration on the HUD VASH Translator Tool and Clarity Santa Cruz County Data Import Tool (DIT). DIT training will focus solely on VASH imports. Training is designed to support ongoing periodic imports of VASH data into Clarity by Santa Cruz.
 - 4.1 Facilitate DIT and HUD VASH Translator Tool training and recording of training for ongoing imports.

E. Reporting and Analytical Support

Community and Agency support preparing and submitting all HUD and federal partner reports, including Point in Time Count, Housing Inventory Count, Longitudinal Statistical Analysis (LSA), and other Community-Related Reports. Annual HUD Notice of Funding Availability (NOFA) support. Ad-hoc data analytics and business intelligence support.

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Analytical Support
 - 1.1. Conduct analysis of data quality to improve data quality of standard data elements across program types
 - 1.2. Develop monitoring reports and dashboards, as needed, to track data quality issues of interest to Santa Cruz. For example:
 - 1.2.1. Housing programs: monitor how many clients have contact information recorded
 - 1.2.2. Housing programs: monitor how many clients have multiple concurrent enrollments in housing and non-housing programs
 - 1.2.3. Housing programs: monitor how many clients have no move in or exit date recorded
 - 1.2.4. Coordinated Entry (CE):
 - 1.2.4.1. Monitor how many clients on the queue are chronically homeless; and
 - 1.2.4.2. Monitor how many program referrals are pending

- 1.3. Analyze data related to community-level reporting of Santa Cruz HMIS participation, bed coverage, and other required reports and provide guidance to Santa Cruz based on analysis
- 1.4. Monitor performance and reporting of monthly placements into housing for all projects
- 1.5. Leverage data quality reports to identify training and online user guide and system ease-of-use gaps and adjust training and user guides to improve quality of data upon data entry
- 1.6. Conduct regular data quality reviews and maintenance of overall system data quality. Maintenance shall include activities such as data cleansing, duplicate client merging, and Santa Cruz data correction requests
- 1.7. Monitor data quality after trainings and provide follow-up communications to attempt to correct any data entry errors
- 1.8. Provide advanced technical support depending on Santa Cruz needs, between Bitfocus engineers and Santa Cruz County team members regarding Looker and MariaDB as used in the Santa Cruz HMIS.
2. Reporting Support. Provide guidance and support for report development and ongoing reports management, including, but not limited to, the following:
 - 2.1. Provide support for robust Looker reporting, including, but not limited to, the following:
 - 2.1.1. Supporting documentation on Looker reports, including actual calculations for calculated fields, meta-data (e.g., Look purpose, create date, last used date, user information, etc.);
 - 2.1.2. Guidance and documentation on how to manage the local report portfolio, including standardizing descriptions to avoid duplicating work, review and consolidation of reports, query identification and reuse, versioning, usage (to support retirement of unused reports) and configuration management;
 - 2.2. Provide basic (i.e., Help Desk) and advanced (e.g., Developer) technical support for Santa Cruz, including ad hoc data requests, advanced decision support, and development of basic queries and dashboards using the integrated Data Analysis tool;
 - 2.2.1. Requests for ad hoc data requests shall be made with at least two business days' notice, with an understanding that complex data requests may require additional time
 - 2.2.2. Development of custom reports and/or dashboards that require custom scripting, modifications to the data model, advanced staffing support, or which integrate external data sources, may be considered beyond the scope of this Agreement and require a separate, duly executed, Statement of Work. Examples of requests considered outside the scope of this agreement include modifications to the base data models or connection to third party data sources.
 - 2.3. Provide technical and administrative support to Santa Cruz and community partner leads to support the use of pre-built reports in the Santa Cruz HMIS report library, including support for federal and state compliance reports.

F. Infrastructure Support

Generation and submission of program and community-level reports. Conduct regular data quality reviews to monitor overall system data quality. Work closely with Partner Agencies to clean up data issues, and improve data quality. Conduct data quality training as needed.

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Manage user access roles and access levels
2. Ensure Santa Cruz HMIS security protocols are met per Santa Cruz, Federal and State policies
3. Participate in status meetings as identified by Santa Cruz to help identify, review and track Santa Cruz HMIS-related risks and issues in the central risk and issue logs
4. Collaborate with Santa Cruz and community partners to identify usability issues and potential solutions
5. Ensure all relevant policy and procedures manuals, including the Santa Cruz HMIS Policy and Procedures manual, are maintained and updated frequently as system changes are made; and ensure

Santa Cruz HMIS and U.S. Department of Housing and Urban Development (HUD) policy files are updated.

6. Provide organizational change support for: new function deployments and system updates of the Santa Cruz HMIS, including documenting and communicating process changes (“As-Is” to “To-Be”), user role and access changes.
7. Maintain and share support documentation, training materials and curriculum of locally established Santa Cruz HMIS practices.
8. Communicate updates and all upcoming Santa Cruz HMIS platform release notes to community partner agencies ahead of the actual releases
9. Maintain the Santa Cruz HMIS website and update regularly with current information, including but not limited to
 - 9.1. Santa Cruz HMIS training materials, including video training; and
 - 9.2. Information, descriptions, and funding sources of programs tracked in HMIS, and local policies as provided by Santa Cruz

G. Compliance Support

Execution of the compliance duties of the HMIS Lead Agency on behalf of Santa Cruz, including planning, system-level monitoring, and enforcement of local policies and procedures. Development and execution of a compliance plan to meet federal and local regulatory requirements, including those imposed by HUD, 42 CFR part 2, and VAWA, as applicable.

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Maintain knowledge and be well-informed of HUD grant awards to the Santa Cruz CoC and HUD-funded programs;
2. Remain current on HUD and federal partner trainings to keep abreast of the changes in data standards, reporting, grants, etc.;
3. Serve as a liaison between the Continuum of Care (CoC) and HUD on Santa Cruz HMIS and related issues;
4. Attend meetings and respond to Santa Cruz Continuum of Care (CoC) inquiries as directed by Santa Cruz;
5. Deliver all data elements in Santa Cruz HMIS as set out by the HUD data standards; and ensure that relevant data is compliant with HUD standards except when otherwise directed by Santa Cruz;
6. Conduct regular reviews of data quality in the Santa Cruz HMIS well in advance of federal reporting deadlines;
7. Provide support to the CoC for the annual HUD Notice of Funding Availability (NOFA) and support Santa Cruz HMIS grant applications, as needed, for continued funding of Santa Cruz HMIS;
8. Assist in the generation and submission of all program and community-level reports as recommended or required of CoC's by HUD or other Federal Agencies, including consolidated application to HUD, Point in Time (PIT) Count, Housing Inventory Count, Annual Homeless Assessment Report (AHAR), Longitudinal Statistical Analysis (LSA) and any other HUD-mandated reports related to Santa Cruz HMIS;
9. Prepare reports for submission to the CoC and other community meetings regarding Santa Cruz HMIS activities;
10. Routinely update the Santa Cruz HMIS platform to maintain compliance with the latest HUD requirements; and
11. Actively participate in responding to HUD when solicited for input/feedback on proposed changes from the HUD vendor community and shall collaborate with Santa Cruz in providing input.

H. Coordinated Entry Support

Configure Santa Cruz HMIS application for Coordinated Entry. Configure the community queue (wait list), eligibility engine, assessment processor, assessments, matchmaking and other internal configuration needs. Participate in the coordinate intake workgroups as needed. Monitor the health of the coordinated entry workflow and Santa Cruz HMIS configuration for optimal effectiveness.

Provided as a package for a set monthly fee that includes, but is not limited to, the following:

1. Develop, configure, support, and maintain Clarity Human Services features and functionality that support Coordinated Entry, including but not limited to:
 - 1.1 Coordinated Entry Assessments and Scoring, Prioritization Queue(s), Program Eligibility and Documentation Requirements, as well as Local Coordinated Entry dashboards, exports, and reports as necessary to support CES
 - 1.2 Coordinated Entry Program configuration
2. Ensure compliance with HUD Coordinated Entry data collection and reporting requirements, including the HUD “Coordinated Entry” APR.
3. Participate in community meetings, planning, and other events as necessary to support the operation and refinement of Coordinated Entry in Santa Cruz

Attachment C, Amendment One: Fee Schedule/Budget

If there are conflicts with any other parts of this agreement, this Budget attachment controls as to the actual budgeted amount for this agreement.

LINE-ITEM EXPENDITURES			ORIGINAL COSTS FY 2024-25	CHANGE	UPDATED COSTS FY 2024-25
SUFFIX-01: SOFTWARE AS A SERVICE (SaaS)					
LICENSING	UNIT	Monthly RATE			
Enterprise Seats, 200 each: per user, w/discount, prorated for monthly	200	\$ 48.41			
Enterprise Seats, Setup Additional (above 150): one-time cost	50	\$ 175.00			
Manager Seats, 30 each: per user, w/discount, prorated for monthly	30	\$ 54.64			
Administrator Seats, 4 each: per user, w/discount, prorated for monthly	4	\$ 163.91			
Enterprise Seats, Setup Additional (above 200): one-time cost		\$ 175.00			
Manager Seats, Setup Additional (above 44): one-time cost		\$ 250.00			
Administrator Seats, Setup Additional (above 4): one-time cost		\$ 300.00			
Agency Seats, 51 each: per user, w/discount, prorated for monthly	51	\$ -			
Training Site Seats: per user, w/discount, prorated for monthly	1	\$ 227.63			
Platform Seat: per user, w/discount, prorated for monthly	1	\$ 546.33			
DATA SUPPORT					
Data Analysis: Standalone: per user #1-4, w/discount, prorated for monthly	4	\$ -			
Data Analysis: Embedded: per user, prorated for monthly	64	\$ 10.92			
Data Analysis: Embedded: System Administrator Only, per user, w/discount, prorated for monthly	4	\$ -			
Data Integration Maintenance: w/discount, prorated for monthly	12	\$ 146.33			
Daily Automated Backup/FTP: monthly	12	\$ 636.54			
Data Integration Tool (DIT)	12	\$ 618.00			
SUFFIX-01 TOTAL			\$186,483	\$0	\$186,483

//

SUFFIX-02: SYSTEM ADMINISTRATION AND SUPPORT			ORIGINAL COSTS FY 2024-25	CHANGE	UPDATED COSTS FY 2024-25
Community Administration			\$66,765		
Agency Management			\$44,167		
Technical Support/Help Desk			\$53,981		
Training/Professional Development			\$19,630		
Reporting & Analytical Support			\$22,083		
Infrastructure Support			\$9,815		
Compliance Support			\$9,815		
Coordinated Entry Support			\$41,713		
SUFFIX-02 TOTAL			\$267,969	\$0	\$267,969
SUFFIX-03: LOOKER™ Tri-County Support					
	UNIT	Monthly RATE			
Looker™ Support Hours invoiced as utilized monthly	30	\$ 275.00			
Data Analysis: Standalone: per user #5 w/discount, prorated for monthly	1	\$ 103.00			
SUFFIX-03 TOTAL			\$0	\$9,486	\$9,486
GRAND TOTAL			\$454,452	\$9,486	\$463,938



Certificate Of Completion

Envelope Id: 93297C6A-89F8-4D32-BF87-BE649D64D6BE
Subject: Complete with Docusign: 25C4452 Bitfocus Amendment One - BOS Meeting 2/11/2025
Source Envelope:
Document Pages: 13
Certificate Pages: 5
AutoNav: Enabled
Envelopeld Stamping: Enabled
Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Status: Completed

Envelope Originator:
HSD CCU
701 Ocean Street
Santa Cruz, CA 95060
hsdccu@santacruzcountyca.gov
IP Address: 63.194.190.100

Record Tracking

Status: Original
12/18/2024 12:34:56 PM
Security Appliance Status: Connected
Storage Appliance Status: Connected
Holder: HSD CCU
hsdccu@santacruzcountyca.gov
Pool: FedRamp
Pool: County of Santa Cruz

Location: DocuSign

Location: DocuSign

Signer Events

Arthur G. Wille
arthur.wille@santacruzcountyca.gov
County of Santa Cruz
Assistant County Counsel
Security Level: Email, Account Authentication (None)

Signature

Signed by:

FD318C222C994D0...

Signature Adoption: Pre-selected Style
Using IP Address: 75.221.94.150

Timestamp

Sent: 12/18/2024 1:01:18 PM
Viewed: 12/18/2024 2:38:41 PM
Signed: 12/18/2024 2:53:26 PM

Electronic Record and Signature Disclosure:
Accepted: 12/18/2024 2:38:41 PM
ID: 2af8c69b-3ecb-4338-a2c1-bf2c01311850

Gina Occhipinti Borasi
Gina.Borasi@santacruzcountyca.gov
Risk Manager
County of Santa Cruz
Security Level: Email, Account Authentication (None)

Signed by:

E4EADC5BA53B4DB...

Signature Adoption: Pre-selected Style
Using IP Address: 63.194.190.100

Sent: 12/18/2024 2:53:28 PM
Viewed: 12/19/2024 3:04:36 PM
Signed: 12/19/2024 3:05:28 PM

Electronic Record and Signature Disclosure:
Accepted: 12/18/2023 9:38:58 AM
ID: 5f1392e5-7eb7-47e8-b6a6-baa8d5c3b8c6

Jeff Ugai
jeff@bitfocus.com
COO
Security Level: Email, Account Authentication (None)

DocuSigned by:

4AA7CC0A8DC7484...

Signature Adoption: Pre-selected Style
Using IP Address: 189.254.68.15

Sent: 12/19/2024 3:05:30 PM
Viewed: 12/19/2024 4:04:44 PM
Signed: 12/19/2024 4:07:30 PM

Electronic Record and Signature Disclosure:
Accepted: 12/19/2024 4:04:44 PM
ID: e42d9fea-7820-480b-a9cf-7de28e1b6a80

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp

Certified Delivery Events	Status	Timestamp
Beth Landes Beth.Landes@santacruzcountyca.gov x4380 County of Santa Cruz Security Level: Email, Account Authentication (None)	<div>VIEWED</div> Using IP Address: 73.162.3.135	Sent: 12/18/2024 12:52:02 PM Viewed: 12/18/2024 1:01:17 PM
Electronic Record and Signature Disclosure: Accepted: 3/1/2022 9:33:40 AM ID: 051b1daf-7103-4480-ae1f-04c3216d7057		

Carbon Copy Events	Status	Timestamp
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Witness Events	Signature	Timestamp
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Notary Events	Signature	Timestamp
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Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	12/18/2024 12:52:02 PM
Certified Delivered	Security Checked	12/19/2024 4:04:44 PM
Signing Complete	Security Checked	12/19/2024 4:07:30 PM
Completed	Security Checked	12/19/2024 4:07:30 PM

Payment Events	Status	Timestamps
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Electronic Record and Signature Disclosure		
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ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, County of Santa Cruz (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

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At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact County of Santa Cruz:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: nada.algharib@santacruzcounty.us

To advise County of Santa Cruz of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at nada.algharib@santacruzcounty.us and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

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To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to nada.algharib@santacruzcounty.us and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

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To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to nada.algharib@santacruzcounty.us and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

By selecting the check-box next to 'I agree to use electronic records and signatures', you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify County of Santa Cruz as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by County of Santa Cruz during the course of your relationship with County of Santa Cruz.

Certificate Of Completion

Envelope Id: 8AD5DFE7-67A2-4435-957E-574F71E252CC		Status: Completed
Subject: Complete with Docusign: Amendment One 25C4452 Bitfocus Inc AMS#24-1095 2/11/2025.pdf		
Source Envelope:		
Document Pages: 18	Signatures: 1	Envelope Originator:
Certificate Pages: 5	Initials: 0	HSD CCU
AutoNav: Enabled	Stamps: 1	701 Ocean Street
Envelopeld Stamping: Enabled		Santa Cruz, CA 95060
Time Zone: (UTC-08:00) Pacific Time (US & Canada)		hsdccu@santacruzcountyca.gov
		IP Address: 134.16.1.185

Record Tracking

Status: Original	Holder: HSD CCU	Location: DocuSign
2/11/2025 11:11:48 AM	hsdccu@santacruzcountyca.gov	
Security Appliance Status: Connected	Pool: FedRamp	
Storage Appliance Status: Connected	Pool: County of Santa Cruz	Location: DocuSign

Signer Events

Randy Morris
Randy.Morris@santacruzcountyca.gov
Director
County of Santa Cruz
Security Level: Email, Account Authentication (None)

Signature

DocuSigned by:



D1FB7500084B1...

Signature Adoption: Pre-selected Style
Using IP Address: 63.194.190.100

Timestamp

Sent: 2/11/2025 11:26:05 AM
Viewed: 2/11/2025 11:27:14 AM
Signed: 2/11/2025 11:27:19 AM

Electronic Record and Signature Disclosure:
Accepted: 6/28/2024 5:36:24 PM
ID: ad38cd27-0fe0-48dc-9c44-141ab3b72fbe

CBD eSignature
cbd.esignature@santacruzcountyca.gov
County of Santa Cruz
Security Level: Email, Account Authentication (None)

Signed



Using IP Address: 63.194.190.100

Sent: 2/11/2025 11:27:20 AM
Viewed: 2/11/2025 2:43:58 PM
Signed: 2/11/2025 2:44:40 PM
Freeform Signing

Electronic Record and Signature Disclosure:
Accepted: 6/20/2024 3:08:48 PM
ID: 4b7794de-1393-406f-a9a3-56a92d4b90d7

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp

Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	2/11/2025 11:26:05 AM
Certified Delivered	Security Checked	2/11/2025 2:43:58 PM
Signing Complete	Security Checked	2/11/2025 2:44:40 PM
Completed	Security Checked	2/11/2025 2:44:40 PM

Payment Events	Status	Timestamps
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Electronic Record and Signature Disclosure
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Getting paper copies

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

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All notices and disclosures will be sent to you electronically

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To contact us by email send messages to: nada.algharib@santacruzcounty.us

To advise County of Santa Cruz of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at nada.algharib@santacruzcounty.us and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

To request paper copies from County of Santa Cruz

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to nada.algharib@santacruzcounty.us and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

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- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to nada.algharib@santacruzcounty.us and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

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