

**SERVICES AGREEMENT FOR HOMELESS MANAGEMENT INFORMATION SYSTEM**

THIS SERVICES AGREEMENT FOR HOMELESS MANAGEMENT INFORMATION SYSTEM ("Agreement") is entered into by and between the **CITY OF OCALA**, a Florida municipal corporation ("City" or "Client") and **WELLSKY CORPORATION**, a foreign profit corporation duly organized in New York and authorized to do business in the state of Florida (EIN: 11-2209324) ("WellSky" or "Vendor").

**WHEREAS**, on October 14, 2021, City issued a Request for Proposals ("RFQ") for the provision of a Homeless Management Information System ("HMIS") to support the Marion County Continuum of Care ("CoC") RFQ No.: CDS/210943 (the "Solicitation"); and

**WHEREAS**, five (5) firms responded to the Solicitation and, after consideration of price and other evaluation factors set forth in the Solicitation, the proposal submitted by WellSky Corporation was the highest scoring proposal as determined by the City's selection committee; and

**WHEREAS**, WellSky Corporation was chosen as the intended awardee to provide a Homeless Management Information System ("HMIS") to support the Marion County Continuum of Care ("CoC") (the "Project"); and

**NOW THEREFORE**, in consideration of the foregoing recitals, the following mutual covenants and conditions, and other good and valuable consideration, City and Vendor agree as follows:

1. **RECITALS.** City and Vendor hereby represent, warrant, and agree that the Recitals set forth above are true and correct and are incorporated herein by reference.
2. **CONTRACT DOCUMENTS.** The Contract Documents which comprise the entire understanding between City and Vendor shall include only this Agreement and those documents listed in this section as Exhibits to this Agreement. Each of these documents is incorporated herein by reference for all purposes. If there is a conflict between the terms of this Agreement and the Contract Documents, then the terms of this Agreement shall control, amend, and supersede any conflicting terms contained in the remaining Contract Documents.

**Exhibits to Agreement:** The Exhibits to this Agreement are as follows:

Exhibit A: Scope of Work (A-1 through A-4)

Exhibit B: WellSky Proposal (B-1 through B-18)

If there is a conflict between the individual Exhibits regarding the scope of work to be performed, then any identified inconsistency shall be resolved by giving precedence in the following order: (1) Exhibit A, then (2) Exhibit B.

3. **SCOPE OF SERVICES.** Vendor shall provide all materials, labor, supervision, tools, accessories, equipment necessary for Vendor to perform its obligations under this Agreement as set forth in the attached **Exhibit A - Scope of Work** and the Contract Documents. The Scope of Services under this Agreement may only be adjusted by written amendment executed by both parties.
  - A. **Standard of Care.** Proposer shall render the services consistent with the standard of care, skill, and diligence exercised by members of the same profession providing similar services under similar conditions at the locale of the Project in accordance with the applicable scope of work mutually agreed upon by the parties. Proposer's standard of care shall not be altered by the application, interpretation, or construction of any other provision of the Agreement
4. **COMPENSATION.** Vendor shall be paid a maximum limiting amount of **ONE HUNDRED THIRTY-EIGHT THOUSAND, FIVE HUNDRED FORTY-SIX AND 50/100 DOLLARS (\$138,546.50)** over the Initial Contract Term in accordance with the Contract Documents.
  - A. **Pricing.** Vendor shall be compensated in accordance with the pricing schedule set forth in the attached **Exhibit B – Price Proposal**. Compensation and pricing under this Agreement may only be adjusted by written amendment executed by both parties.
  - B. **Renewal Pricing Increases.** Any pricing increase for Renewal Terms shall be subject to negotiation as approved by City. Any and all renewals shall be subject to a maximum negotiated price increase of no more than **THREE PERCENT (3%) ANNUALLY** unless there are mitigating market conditions. Vendor shall submit justification and documentation with any and all requests for pricing increases at least **NINETY (90) DAYS** prior to the end of the then contract term.
  - C. **Invoice Submission.** All monthly invoices submitted by Vendor shall include the City Contract Number, an assigned Invoice Number, and an Invoice Date. Vendor shall submit the original invoice through the responsible City Project Manager at: **City of Ocala Community Development Services**, Attn: **James Haynes** E-Mail: [jhaynes@ocalafl.org](mailto:jhaynes@ocalafl.org).
  - D. **Payment of Invoices by City.** The City Project Manager must review and approve all invoices prior to payment. City Project Manager's approval shall not be unreasonably withheld, conditioned, or delayed. Payments by City shall be made no later than the time periods established in section 218.735, Florida Statutes.
  - E. **Withholding of Payment.** City reserves the right to withhold, in whole or in part, payment for any and all work that: (i) has not been completed by Vendor; (ii) is inadequate or defective and has not been remedied or resolved in a manner satisfactory to the City Project Manager; or (iii) which fails to comply with any term, condition, or other

- requirement under this Agreement. Any payment withheld shall be released and remitted to Vendor within **THIRTY (30)** calendar days of the Vendor's remedy or resolution of the inadequacy or defect.
- F. **Excess Funds.** If due to mistake or any other reason Vendor receives payment under this Agreement in excess of what is provided for by the Agreement, Vendor shall promptly notify City upon discovery of the receipt of the overpayment. Any overpayment shall be refunded to City within **THIRTY (30)** days of Vendor's receipt of the overpayment or must also include interest calculated from the date of the overpayment at the interest rate for judgment at the highest rate allowed by law.
- G. **Tax Exemption.** City is exempt from all federal excise and state sales taxes (State of Florida Consumer's Certification of Exemption 85-8012621655C-9). The City's Employer Identification Number is 59-60000392. Vendor shall not be exempted from paying sales tax to its suppliers for materials to fulfill contractual obligations with the City, nor will Vendor be authorized to use City's Tax Exemption Number for securing materials listed herein.
5. **EFFECTIVE DATE AND TERM.** This Agreement shall become effective and commence on **APRIL 6, 2022** and continue in effect through and including **APRIL 5, 2025**. This Agreement may be renewed for no more than **TWO (2)** additional **ONE-YEAR** (1-Year) periods (each a "Renewal Term") by written consent between City and Vendor.
6. **TIME FOR PERFORMANCE.** Time is of the essence with respect to the performance of all duties, obligations, and responsibilities set forth in this Agreement and the Contract Documents. At no time will the Vendor be allowed to lag behind.
- A. **Lead Time.** The maximum acceptable lead time to begin the implementation phase is **TWO (2) WEEKS** from the City issued Notice-to-Proceed. At no time will the Vendor be allowed to lag behind.
- B. **Implementation and Training Schedule.** The complete roll-out and "go live" for the Project must be completed within **SIXTY (60) DAYS** of contract execution, with total existing data migration completed no later than **JUNE 30, 2023**.
- C. The Time for Performance under this Agreement may only be adjusted by Change Order, in the sole and absolute discretion of City. Any request for an extension of the Time for Performance must be submitted in a writing delivered to the City Project Manager, along with all supporting data, within **SEVEN (7)** calendar days of the occurrence of the event giving rise to the need for adjustment unless the City allows an additional period of time to ascertain more accurate data. All requests for adjustments in the Contract Time shall be determined by City.

- D. As to any delay, inefficiency, or interference in this performance of this Agreement caused by any act or failure to act by City, the Vendor's sole remedy shall be the entitlement of an extension of time to complete the performance of the affected work in accordance with the Contract Documents. Vendor agrees to make no claim for extra or additional costs attributable to said delays, inefficiencies or interference, except as provided in this Agreement.
- E. None of the provisions of this section shall exclude City's right of recovery for damages caused by delays or inefficiencies caused by any act or failure to act by Vendor, to include costs incurred by City for the procurement of additional professional services.
- 7. **FORCE MAJEURE.** Neither party shall be liable for delay, damage, or failure in the performance of any obligation under this Agreement if such delay, damage, or failure is due to causes beyond its reasonable control, including without limitation: fire, flood, strikes and labor disputes, acts of war, acts of nature, terrorism, civil unrest, pandemics, acts or delays in acting of the government of the United States or the several states, judicial orders, decrees or restrictions, or any other like reason which is beyond the control of the respective party ("Force Majeure"). The party affected by any event of force majeure shall use reasonable efforts to remedy, remove, or mitigate such event and the effects thereof with all reasonable dispatch.
  - A. The party affected by force majeure shall provide the other party with full particulars thereof including, but not limited to, the nature, details, and expected duration thereof, as soon as it becomes aware.
  - B. When force majeure circumstances arise, the parties shall negotiate in good faith any modifications of the terms of this Agreement that may be necessary or appropriate in order to arrive at an equitable solution. Vendor performance shall be extended for a number of days equal to the duration of the force majeure. Vendor shall be entitled to an extension of time only and, in no event, shall Vendor be entitled to any increased costs, additional compensation, or damages of any type resulting from such force majeure delays.
- 8. **INSPECTION AND ACCEPTANCE OF THE WORK.** All services, work, and materials provided by Vendor under this Agreement shall be provided to the satisfaction and approval of the Project Manager.
  - A. The Project Manager shall decide all questions regarding the quality, acceptability, and/or fitness of materials furnished or workmanship performed, the rate of progress of the work, the interpretation of the plans and specifications, and the acceptable fulfillment of the Agreement, in his or her sole discretion, based upon both the requirements set forth by

City and the information provided by Vendor in its quotation. The authority vested in the Project Manager pursuant to this paragraph shall be confined to the direction or specification of what is to be performed under this Agreement and shall not extend to the actual execution of the work.

B. Neither the Project Manager's review of Vendor's work nor recommendations made by Project Manager pursuant to this Agreement will impose on Project Manager any responsibility to supervise, direct, or control Vendor's work in progress or for the means, methods, techniques, sequences, procedures, or safety precautions or programs incident Vendor's furnishing and performing the work.

9. **TERMINATION AND DEFAULT.** Either party, upon determination that the other party has failed or refused to perform or is otherwise in breach of any obligation or provision under this Agreement or the Contract Document, may give written notice of default to the defaulting party in the manner specified for the giving of notices herein. Termination of this Agreement by either party for any reason shall have no effect upon the rights or duties accruing to the parties prior to termination.

A. **Termination by City for Cause.** City shall have the right to terminate this Agreement immediately, in whole or in part, upon the failure of Vendor to carry out any obligation, term, or condition of this Agreement. City's election to terminate the Agreement for default shall be communicated by providing Vendor written notice of termination in the manner specified for the giving of notices herein. Any notice of termination given to Vendor by City shall be effective immediately, unless otherwise provided therein, upon the occurrence of any one or more of the following events:

- (1) Vendor fails to timely and properly perform any of the services set forth in the specifications of the Agreement;
- (2) Vendor fails to perform services required within the time stipulated in the Agreement;
- or
- (3) Vendor fails to make progress in the performance of the Agreement and/or gives City reason to believe that Vendor cannot or will not perform to the requirements of the Agreement.

B. **Vendor's Opportunity to Cure Default.** City may, in its sole discretion, provide Vendor with an opportunity to cure the violations set forth in City's notice of default to Vendor. Vendor shall commence to cure the violations immediately and shall diligently and continuously prosecute such cure to completion within a reasonable time as determined by City. If the violations are not corrected within the time determined to be reasonable by City or to the reasonable satisfaction of City, City may, without further notice, declare

Vendor to be in breach of this Agreement and pursue all remedies available at law or equity, to include termination of this Agreement without further notice.

C. **City's Remedies Upon Vendor Default.** In the event that Vendor fails to cure any default under this Agreement within the time period specified in this section, City may pursue any remedies available at law or equity, including, without limitation, the following:

- (1) City shall be entitled to terminate this Agreement without further notice;
- (2) City shall be entitled to hire another vendor to complete the required work in accordance with the needs of City;
- (3) City shall be entitled to recover from Vendor all damages, costs, and attorney's fees arising from Vendor's default prior to termination; and
- (4) City shall be entitled to recovery from Vendor any actual excess costs by: (i) deduction from any unpaid balances owed to Vendor; or (ii) any other remedy as provided by law.

D. **Termination for Non-Funding.** In the event that budgeted funds to finance this Agreement are reduced, terminated, or otherwise become unavailable, City may terminate this Agreement upon written notice to Vendor without penalty or expense to City. City shall be the final authority as to the availability of budgeted funds.

E. **Termination for Convenience.** City reserves the right to terminate this Agreement in whole or in part at any time for the convenience of City without penalty or recourse. The Project Manager shall provide written notice of the termination. Upon receipt of the notice, Vendor shall immediately discontinue all work as directed in the notice, notify all subcontractors of the effective date of the termination, and minimize all further costs to City including, but not limited to, the placing of any and all orders for materials, facilities, or supplies, in connection with its performance under this Agreement. Vendor shall be entitled to receive compensation solely for: (1) the actual cost of the service performed in conformity with this Agreement; and/or (2) such other costs incurred by Vendor as permitted under this Agreement and approved by City.

10. **PERFORMANCE EVALUATION.** At the end of the contract, City may evaluate Vendor's performance. Any such evaluation will become public record.

11. **NOTICE REGARDING FAILURE TO FULFILL AGREEMENT.** Any vendor who enters into an Agreement with the City of Ocala and fails to complete the contract term, for any reason, shall be subject to future bidding suspension for a period of **ONE (1)** year and bid debarment for a period of up to **THREE (3)** years for serious contract failures.

12. **VENDOR REPRESENTATIONS.** Vendor expressly represents that:

- A. Vendor has read and is fully familiar with all of the terms and conditions of this Agreement, the Contract Documents, and other related data and acknowledges that they are sufficient in scope and detail to indicate and convey understanding of all terms and conditions of the work to be performed by Vendor under this Agreement.
- B. Vendor has disclosed, in writing, all known conflicts, errors, inconsistencies, discrepancies, or omissions discovered by Vendor in the Contract Documents, and that the City's written resolution of same is acceptable to Vendor.
- C. Vendor has had an opportunity to visit, has visited, and has had an opportunity to examine and ask questions regarding the sites upon which services are to be performed and is satisfied with the site conditions that may affect cost, progress, and performance of the work, as observable or determinable by Vendor's own investigation.
- D. Vendor is familiar with all local, state, and Federal laws, regulations, and ordinances which may affect cost, progress, or its performance under this Agreement whatsoever.
- E. **Public Entity Crimes.** Neither Vendor, its parent corporations, subsidiaries, members, shareholders, partners, officers, directors or executives, nor any of its affiliates, Vendors, suppliers, subcontractors, or consultants under this Agreement have been placed on the convicted vendor list following a conviction of a public entity crime. Vendor understands that a "public entity crime" as defined in section 287.133(1)(g), Florida Statutes, is "a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States..." Vendor further understands that any person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime (1) may not submit a bid, proposal, or reply on a contract: (a) to provide any goods or services to a public entity; (b) for the construction or repair of a public building or public work; or (c) for leases of real property to a public entity; (2) may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and (3) may not transact business with any public entity in excess of the threshold amount provided in section 287.017, Florida Statutes, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

13. **VENDOR RESPONSIBILITIES.** Except as otherwise specifically provided for in this Agreement, the following provisions are the responsibility of the Vendor:



- A. Vendor shall competently and efficiently supervise, inspect, and direct all services to be performed under this Agreement, devoting such attention thereto and applying such skills and expertise as may be necessary to perform the services in accordance with the Contract Documents.
  - B. Vendor shall be solely responsible for the means, methods, techniques, sequences, or procedures, and safety precautions or programs incident thereto.
  - C. Vendor shall be responsible to see that the provided services comply accurately with the contract and the intent thereof.
  - D. Vendor shall comply with all local, state, and Federal laws, regulations, and ordinances which may affect cost, progress, or its performance under this Agreement, and be responsible for all costs associated with same.
  - E. Vendor shall continue its performance under this Agreement during the pendency of any dispute or disagreement arising out of or relating to this Agreement, except as Vendor and City may otherwise agree in writing.
14. **NO EXCLUSIVITY.** It is expressly understood and agreed by the parties that this is not an exclusive agreement. Nothing in this Agreement shall be construed as creating any exclusive arrangement with Vendor or as prohibit City from either acquiring similar, equal, or like services or from executing additional contracts with other entities or sources.
15. **RESPONSIBILITIES OF CITY.** City or its Representative shall issue all communications to Vendor. City has the authority to request changes in the work in accordance with the terms of this Agreement and with the terms in **Exhibit A**. City has the authority to stop work or to suspend any work.
16. **COMMERCIAL AUTO LIABILITY INSURANCE.** Vendor shall procure and maintain, for the life of this Agreement, commercial automobile liability insurance covering all automobiles owned, non-owned, hired, and scheduled by Vendor with a combined limit of not less than One Million Dollars (\$1,000,000) for bodily injury and property damage for each accident. Vendor's commercial automobile liability insurance policy must include, as additional insured, the City of Ocala, a political subdivision of the State of Florida, and its officials, employees, and assigns.
17. **GENERAL LIABILITY INSURANCE.** Vendor shall procure and maintain, for the life of this Agreement, commercial general liability insurance with minimum coverage limits not less than:



- A. One Million Dollars (\$1,000,000) per occurrence and One Million Dollars (\$2,000,000) aggregate limit for bodily injury, property damage, and personal and advertising injury; and
- B. One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate limit for products and completed operations.
- C. Coverage for contractual liability is also required.
- D. City, a political subdivision of the State of Florida, and its officials, employees, and volunteers shall be covered as an additional insured with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage regarding liability arising out of activities performed by or on behalf of Vendor. The coverage shall contain no special limitation on the scope of protection afforded to City, its officials, employees, or volunteers.

18. **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY.** Vendor shall procure and maintain, for the life of this Agreement, Workers' Compensation insurance and employer's liability coverage in amounts required by Florida law. If Vendor claims an exemption from workers' compensation coverage, Vendor must provide a copy of the Certificate of Exemption from the Florida Division of Workers' Compensation for all officers or members of an LLC claiming exemption who will be participating in the Work. Vendor is solely responsible for compliance with any Federal workers' compensation laws such as Jones Act and USL&H Act, including any benefits available to any workers performing work on this Project. In case any class of employees engaged in hazardous work under this Agreement is not protected under Worker's Compensation statutes, the Vendor shall provide and cause each subcontractor to provide adequate insurance satisfactory to the City for the protection of its employees not otherwise protected.

19. **PROFESSIONAL LIABILITY INSURANCE.** Vendor shall procure and maintain, for the life of this Agreement and a term of five (5) years after the expiration of this Agreement, Professional Liability insurance with minimum coverage limits of One Million Dollars (\$1,000,000). It is understood that this type of insurance coverage is only available on a Claims Made basis and Additional Insured endorsements are not available.

20. **MISCELLANEOUS INSURANCE PROVISIONS.**

- A. Insurance Requirements. These insurance requirements shall not relieve or limit the liability of Vendor. City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect Vendor's interests or liabilities but are

merely minimums. No insurance is provided by the City under this contract to cover Vendor. **No services shall commence under this contract until the required Certificate(s) of Insurance have been provided.** Services shall not continue after expiration (or cancellation) of the Certificates of Insurance and shall not resume until new Certificate(s) of Insurance have been provided. Insurance written on a "Claims Made" form is not acceptable without consultation with City of Ocala Risk Management, unless otherwise specified herein.

- B. Deductibles. Vendor is responsible for paying any and all deductibles or self-insured retention. Any deductibles or self-insured retentions above \$100,000 must be declared to and approved by the City. Approval will not be unreasonably withheld.
- C. Certificates of Insurance. Vendor shall provide Certificates of Insurance, accompanied by copies of all endorsements required by this section, that are issued by an agency authorized to do business in the State of Florida and with an A.M. Best rating\* of A-V or greater. Renewal certificates must be forwarded to the **City of Ocala Contracting Department, Third Floor, 110 SE Watula Avenue, Ocala, FL 34471, E-Mail: [vendors@ocalafl.org](mailto:vendors@ocalafl.org)** prior to the policy expiration.

\*Non-rated insurers must be pre-approved by the City Risk Manager.

- D. Failure to Maintain Coverage. In the event Vendor fails to disclose each applicable deductible/self-insured retention or obtain or maintain in full force and effect any insurance coverage required to be obtained by Vendor under this Agreement, Vendor shall be considered to be in default of this Agreement.
- E. Severability of Interests. Vendor shall arrange for its liability insurance to include General Liability, Business Automobile Liability, and Excess/Umbrella Insurance, or be endorsed to include, a severability of interests/cross liability provision, so that the "City of Ocala" (where included as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.
- F. Mandatory Endorsements for All Required Policies. All required policies shall include: (i) endorsement that waives any right of subrogation against the City of Ocala for any policy of insurance provided under this Agreement or under any state or federal worker's compensation or employer's liability act; and (ii) endorsement to give the City of Ocala no less than **THIRTY (30)** days written notice (with the exception of non-payment of premium which requires a **TEN (10)** calendar day notice) in the event of cancellation or material change.

21. **SAFETY/ENVIRONMENTAL.** Vendor shall be responsible for initiating, maintaining, and supervising all safety precautions and programs in connection with the provision of services. Vendor shall take all necessary precautions for the safety of, and shall provide the necessary protection to prevent damage, injury, or loss to:

- A. All employees on the work and other persons that may be affected thereby;
- B. All work, materials and equipment to be incorporated therein, whether in storage on or off the site; and
- C. Other property at the site or adjacent thereto, including trees, shrubs, lawns, walks, pavements, roadways, structures, and utilities.

All, injury, or loss to any property caused, directly or indirectly, in whole or in part, by Vendor, any subcontractor, or anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, shall be remedied by Vendor.

22. **NON-DISCRIMINATORY EMPLOYMENT PRACTICES.** During the performance of the contract, the Vendor shall not discriminate against any employee or applicant for employment because of race, color, religion, ancestry, national origin, sex, pregnancy, age, disability, sexual orientation, gender identity, marital or domestic partner status, familial status, or veteran status and shall take affirmative action to ensure that an employee or applicant is afforded equal employment opportunities without discrimination. Such action shall be taken with reference to, but not limited to: recruitment, employment, termination, rates of pay or other forms of compensation and selection for training or retraining, including apprenticeship and on-the-job training.

23. **SUBCONTRACTORS.** Nothing in this Agreement shall be construed to create, impose, or give rise to any duty owed by City or its representatives to any subcontractor of Vendor or any other persons or organizations having a direct contract with Vendor, nor shall it create any obligation on the part of City or its representatives to pay or seek payment of any monies to any subcontractor of Vendor or any other persons or organizations having a direct contract with Vendor, except as may otherwise be required by law. City shall not be responsible for the acts or omissions of any Vendor, subcontractor, or of any of their agents or employees. nor shall it create any obligation on the part of City or its representatives to pay or to seek the payment of any monies to any subcontractor or other person or organization, except as may otherwise be required by law.

24. **DELAYS AND DAMAGES.** The Vendor agrees to make no claim for extra or additional costs attributable to any delays, inefficiencies, or interference in the performance of this contract occasioned by any act or omission to act by the City except as provided in the Agreement.

The Vendor also agrees that any such delay, inefficiency, or interference shall be compensated for solely by an extension of time to complete the performance of the work in accordance with the provision in the standard specification.

25. **EMERGENCIES.** In an emergency affecting the welfare and safety of life or property, Vendor, without special instruction or authorization from the City Project Manager, is hereby permitted, authorized and directed to act at its own discretion to prevent threatened loss or injury. Except in the case of an emergency requiring immediate remedial work, any work performed after regular working hours, on Saturdays, Sundays or legal holidays, shall be performed without additional expense to the City unless such work has been specifically requested and approved by the City Project Manager. Vendor shall be required to provide to the City Project Manager with the names, addresses and telephone numbers of those representatives who can be contacted at any time in case of emergency. Vendor's emergency representatives must be fully authorized and equipped to correct unsafe or excessively inconvenient conditions on short notice by City.
26. **INDEPENDENT CONTRACTOR STATUS.** Vendor acknowledges and agrees that under this Agreement, Vendor and any agent or employee of Vendor shall be deemed at all times to be an independent contractor and shall be wholly responsible for the manner in which it performs the services and work required under this Agreement. Neither Vendor nor its agents or employees shall represent or hold themselves out to be employees of City at any time. Neither Vendor nor its agents or employees shall have employee status with City. Nothing in this Agreement shall constitute or be construed to create any intent on the part of either party to create an agency relationship, partnership, employer-employee relationship, joint venture relationship, or any other relationship which would allow City to exercise control or discretion over the manner or methods employed by Vendor in its performance of its obligations under this Agreement.
27. **ACCESS TO FACILITIES.** City shall provide Vendor with access to all City facilities as is reasonably necessary for Vendor to perform its obligations under this Agreement.
28. **ASSIGNMENT.** Neither party may assign its rights or obligations under this Agreement to any third party without the prior express approval of the other party, which shall not be unreasonably withheld.
29. **RIGHT OF CITY TO TAKE OVER CONTRACT.** Should the work to be performed by Vendor under this Agreement be abandoned, or should Vendor become insolvent, or if Vendor shall assign or sublet the work to be performed hereunder without the written consent of City, the City Project Manager shall have the power and right to hire and acquire additional men and

equipment, supply additional material, and perform such work as deemed necessary for the completion of this Agreement. Under these circumstances, all expenses and costs actually incurred by City to accomplish such completion shall be credited to City along with amounts attributable to any other elements of damage and certified by the Project Manager. The City Project Manager's certification as to the amount of such liability shall be final and conclusive.

30. **PUBLIC RECORDS.** Vendor shall comply with all applicable provisions of the Florida Public Records Act, Chapter 119, Florida Statutes. Specifically, Vendor shall:

- A. Keep and maintain public records required by the public agency to perform the service.
- B. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
- C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if Vendor does not transfer the records to the public agency.
- D. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of Vendor or keep and maintain public records required by the public agency to perform the service. If Vendor transfers all public records to the public agency upon completion of the contract, Vendor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Vendor keeps and maintains public records upon completion of the contract, Vendor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

**IF VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: CITY OF OCALA, OFFICE OF THE CITY CLERK; 352-629-8266; E-mail: [clerk@ocalafl.org](mailto:clerk@ocalafl.org); City Hall, 110 SE Watula Avenue, Ocala, FL 34471.**

31. **AUDIT.** Vendor shall comply and cooperate immediately with any inspections, reviews, investigations, or audits relating to this Agreement as deemed necessary by the Florida Office of the Inspector General, the City's Internal or External auditors or by any other Florida official with proper authority.
32. **PUBLICITY.** Vendor shall not use City's name, logo, seal or other likeness in any press release, marketing materials, or other public announcement without City's prior written approval.
33. **E-VERIFY.** Pursuant to section 448.095, Vendor shall register with and use the U.S. Department of Homeland Security's ("DHS") E-Verify System, accessible at <https://e-verify.uscis.gov/emp>, to verify the work authorization status of all newly hired employees. Vendor shall obtain affidavits from any and all subcontractors in accordance with paragraph 2(b) of section 448.095, Florida Statutes, and maintain copies of such affidavits for the duration of this Agreement. By entering into this Agreement, Vendor certifies and ensures that it utilizes and will continue to utilize the DHS E-Verify System for the duration of this Agreement and any subsequent renewals of same. Vendor understands that failure to comply with the requirements of this section shall result in the termination of this Agreement and Vendor may lose the ability to be awarded a public contract for a minimum of one (1) year after the date on which the Agreement was terminated. Vendor shall provide a copy of its DHS Memorandum of Understanding upon City's request. Please visit [www.e-verify.gov](http://www.e-verify.gov) for more information regarding the E-Verify System.
34. **CONFLICT OF INTEREST.** Vendor is required to have disclosed, with the submission of their bid, the name of any officer, director, or agent who may be employed by the City. Vendor shall further disclose the name of any City employee who owns, directly or indirectly, any interest in Vendor's business or any affiliated business entity. Any additional conflicts of interest that may occur during the contract term must be disclosed to the City of Ocala Procurement Department.
35. **WAIVER.** The failure or delay of any party at any time to require performance by another party of any provision of this Agreement, even if known, shall not affect the right of such party to require performance of that provision or to exercise any right, power or remedy hereunder. Any waiver by any party of any breach of any provision of this Agreement should not be construed as a waiver of any continuing or succeeding breach of such provision, a waiver of the provision itself, or a waiver of any right, power or remedy under this Agreement. No notice to or demand on any party in any circumstance shall, of itself, entitle such party to any other or further notice or demand in similar or other circumstances.
36. **SEVERABILITY OF ILLEGAL PROVISIONS.** Wherever possible, each provision of this Agreement shall be interpreted in such a manner as to be effective and valid under the

applicable law. Should any portion of this Agreement be declared invalid for any reason, such declaration shall have no effect upon the remaining portions of this Agreement.

37. **INDEMNITY.** Vendor shall indemnify City and its elected officials, employees and volunteers against, and hold City and its elected officials, employees and volunteers harmless from, all third-party damages, claims, losses, costs, and expenses ("Third Party Claim"), including reasonable attorneys' fees, which City or its elected officials, employees or volunteers may sustain, or which may be asserted against City or its elected officials, employees or volunteers, arising out of the activities contemplated by this Agreement including, without limitation, harm or personal injury to third persons during the term of this Agreement to the extent attributable to the negligent, illegal, or willful misconduct of Vendor or its employees or agents while performing services at City of Ocala's site, and provided that for the avoidance of doubt such indemnity shall not apply as relates to the design or functionality of the Services as defined in the Vendor's Master License and Services Agreement included and attached in **Exhibit C – Order Form**.
38. **INTELLECTUAL PROPERTY RIGHTS.** Vendor shall indemnify and hold harmless the City from liability of any that the Cloud Services (as defined in the Master License Services Agreement included and attached in **Exhibit C- Order Form**) violates any currently existing U.S. copyright, service mark, trademark, or patent including its use by the City. If Vendor uses any design, device, material, or works covered by letters, service mark, trademark, patent, copyright or any other intellectual property right, it is mutually agreed and understood, without exception, that the price shall include all royalties of costs arising from the use of such design, device or materials in any way involved in the work. This article shall survive the termination of any contract with the City.
39. **NO WAIVER OF SOVEREIGN IMMUNITY.** Nothing herein is intended to waive sovereign immunity by the City to which sovereign immunity may be applicable, or of any rights or limits of liability existing under Florida Statute § 768.28. This term shall survive the termination of all performance or obligations under this Agreement and shall be fully binding until any proceeding brought under this Agreement is barred by any applicable statute of limitations.
40. **NOTICES.** All notices, certifications or communications required by this Agreement shall be given in writing and shall be deemed delivered when personally served, or when received if by facsimile transmission with a confirming copy mailed by registered or certified mail, postage prepaid, return receipt requested. Notices can be concurrently delivered by e-mail. All notices shall be addressed to the respective parties as follows:



If to Vendor:

Wellsky Corporation  
Attention: David McMillan  
11300 Switzer Road  
Overland Park, KS 66210  
Phone: 703-674-5103  
E-mail: [dave.mcmillan@wellsky.com](mailto:dave.mcmillan@wellsky.com)

If to City of Ocala:

Tiffany Kimball, Contracting Officer  
110 SE Watula Avenue, 3rd Floor  
Ocala, Florida 34471  
Phone: 352-629-8366  
Fax: 352-690-2025  
E-mail: [tkimball@ocalafl.org](mailto:tkimball@ocalafl.org)

Copy to:

Robert W. Batsel, Jr.  
Gooding & Batsel, PLLC  
1531 SE 36<sup>th</sup> Avenue  
Ocala, Florida 34471  
Phone: 352-867-7707  
E-mail: [rbatsel@lawyersocala.com](mailto:rbatsel@lawyersocala.com)

41. **ATTORNEYS' FEES.** If any civil action, arbitration or other legal proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default or misrepresentation in connection with any provision of this Agreement, the successful or prevailing party shall be entitled to recover reasonable attorneys' fees, sales and use taxes, court costs and all expenses reasonably incurred even if not taxable as court costs (including, without limitation, all such fees, taxes, costs and expenses incident to arbitration, appellate, bankruptcy and post-judgment proceedings), incurred in that civil action, arbitration or legal proceeding, in addition to any other relief to which such party or parties may be entitled. Attorneys' fees shall include, without limitation, paralegal fees, investigative fees, administrative costs, sales and use taxes and all other charges reasonably billed by the attorney to the prevailing party.

42. **JURY WAIVER.** IN ANY CIVIL ACTION, COUNTERCLAIM, OR PROCEEDING, WHETHER AT LAW OR IN EQUITY, WHICH ARISES OUT OF, CONCERNS, OR RELATES TO THIS AGREEMENT, ANY AND ALL TRANSACTIONS CONTEMPLATED HEREUNDER, THE PERFORMANCE HEREOF, OR THE RELATIONSHIP CREATED HEREBY, WHETHER SOUNDING IN CONTRACT, TORT, STRICT LIABILITY, OR OTHERWISE, TRIAL SHALL BE TO A COURT OF COMPETENT JURISDICTION AND NOT TO A JURY. EACH PARTY HEREBY IRREVOCABLY WAIVES ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY. NEITHER PARTY HAS MADE OR RELIED UPON ANY ORAL REPRESENTATIONS TO OR BY ANY OTHER PARTY REGARDING THE ENFORCEABILITY OF THIS PROVISION. EACH PARTY HAS READ AND UNDERSTANDS THE EFFECT OF THIS JURY WAIVER PROVISION.
43. **GOVERNING LAW.** This Agreement is and shall be deemed to be a contract entered and made pursuant to the laws of the State of Florida and shall in all respects be governed, construed, applied and enforced in accordance with the laws of the State of Florida.
44. **JURISDICTION AND VENUE.** The parties acknowledge that a majority of the negotiations, anticipated performance and execution of this Agreement occurred or shall occur in Marion County, Florida. Any civil action or legal proceeding arising out of or relating to this Agreement shall be brought only in the courts of record of the State of Florida in Marion County or the United States District Court, Middle District of Florida, Ocala Division. Each party consents to the exclusive jurisdiction of such court in any such civil action or legal proceeding and waives any objection to the laying of venue of any such civil action or legal proceeding in such court and/or the right to bring an action or proceeding in any other court. Service of any court paper may be effected on such party by mail, as provided in this Agreement, or in such other manner as may be provided under applicable laws, rules of procedures or local rules.
45. **REFERENCE TO PARTIES.** Each reference herein to the parties shall be deemed to include their successors, assigns, heirs, administrators, and legal representatives, all whom shall be bound by the provisions hereof.
46. **MUTUALITY OF NEGOTIATION.** Vendor and City acknowledge that this Agreement is a result of negotiations between Vendor and City, and the Agreement shall not be construed in favor

of, or against, either party because of that party having been more involved in the drafting of the Agreement.

47. **SECTION HEADINGS.** The section headings herein are included for convenience only and shall not be deemed to be a part of this Agreement.
48. **RIGHTS OF THIRD PARTIES.** Nothing in this Agreement, whether express or implied, is intended to confer any rights or remedies under or because of this Agreement on any persons other than the parties hereto and their respective legal representatives, successors and permitted assigns. Nothing in this Agreement is intended to relieve or discharge the obligation or liability of any third persons to any party to this Agreement, nor shall any provision give any third persons any right of subrogation or action over or against any party to this Agreement.
49. **AMENDMENT.** No amendment to this Agreement shall be effective except those agreed to in writing and signed by both parties to this Agreement.
50. **COUNTERPARTS.** This Agreement may be executed in counterparts, each of which shall be an original and all of which shall constitute the same instrument.
51. **ELECTRONIC SIGNATURE(S).** Vendor, if and by offering an electronic signature in any form whatsoever, will accept and agree to be bound by said electronic signature to all terms and conditions of this Agreement. Further, a duplicate or copy of the Agreement that contains a duplicated or non-original signature will be treated the same as an original, signed copy of this original Agreement for all purposes.
52. **ENTIRE AGREEMENT.** This Agreement, including exhibits, (if any) constitutes the entire Agreement between the parties hereto with respect to the subject matter hereof. There are no other representations, warranties, promises, agreements or understandings, oral, written or implied, among the Parties, except to the extent reference is made thereto in this Agreement. No course of prior dealings between the parties and no usage of trade shall be relevant or admissible to supplement, explain, or vary any of the terms of this Agreement. No representations, understandings, or agreements have been made or relied upon in the making of this Agreement other than those specifically set forth herein.
53. **LEGAL AUTHORITY.** Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.



IN WITNESS WHEREOF, the parties have executed this Agreement on \_\_\_\_\_.

**ATTEST:**

**CITY OF OCALA**

\_\_\_\_\_  
Angel B. Jacobs  
City Clerk

\_\_\_\_\_  
Ire Bethea, Sr.  
City Council President

**Approved as to form and legality:**

**WELLSKY CORPORATION**

\_\_\_\_\_  
Robert W. Batsel, Jr.  
City Attorney

\_\_\_\_\_  
By: \_\_\_\_\_  
(Printed Name)

Title: \_\_\_\_\_  
(Vice-President or higher)

**BACKGROUND**

Vendor shall provide Homeless Management Information System (HMIS) software supporting the Marion County Continuum of Care (CoC).

**CONTRACT TERM/DELIVERY TIMELINE**

1. **Implementation and Training:** The complete roll-out and “go live” must be completed within sixty (60) days of contract execution, with total existing data migration completed by June 30, 2023.

**PROJECT SUMMARY AND DELIVERABLES**

1. Vendor will be required to perform the following software services; this list is not an attempt to exclusively define those specific activities the Vendor will perform.
  - Implementation of software application including data and information migration from the City’s current application (Charity Tracker).
  - Staff training on software application for various users.
  - Ongoing support (for duration of the contract) of the software application.
2. **Product Demonstration:** As part of the review process, Vendor must provide a live demonstration or sandbox to the City.

**TECHNICAL REQUIREMENTS**

1. Software solution provided must include, but is not limited to the following attributes:
  - A. **Downtime:** Limited unplanned downtime for maintenance.
  - B. **Security:** Sufficient security protocols in place including end-to-end data encryption, automatic time out or lock out, concurrent login prevention, username, and password access requirements, at least 128-bit + encryption, SSL certificate, user log(s) and automated audit trail.
  - C. **Accessibility:** Features that allow those with disabilities or special needs to enter and report data (508 Compliance).
  - D. **Deadlines:** meet HUD and federal partner deadlines for implementing data element, response category and report specification updates.
  - E. **System Access and Administration Must:**
    - 1) Provide access to 20 agencies with 50 licenses.
    - 2) Allow the HMIS Administrator(s) to manage user access through a username, password, and role-based access.
    - 3) Multiple, tiered levels of system access that provides access to only necessary data collection and reporting functionality for the HMIS user to complete their responsibilities.
    - 4) Available for online data entry and real-time data access.
    - 5) Software can be securely accessed from multiple devices including computers, smart phones, and tablets.
    - 6) Allow users to reset their passwords without HMIS System Administrator assistance.

**F. Up-to-date Reports:**

- 1) HUD required reports Annual Progress Report (APR), Longitudinal Statistical Analysis (LSA), System Performance Measures (HUD SPM), Consolidated Annual Performance Evaluation Report (CAPER) and Data Quality Framework.
- 2) Federal partner reports for HUD, SAMHSA, RHY, and the VA.

**G. Record and Data Entry:**

- 1) Collect assessment data.
- 2) Manage record de-duplication via client record merger feature or other functionality.
- 3) Sufficient protocols to prevent duplicate client record creation.
- 4) Customizable prioritization function that can be accessed by HMIS users for coordinated entry process purposes.
- 5) Ability to upload a photo to identify the client.
- 6) Barcode, scan card or biometric capabilities for data entry.
- 7) Coordinated entry process reports available (including reports for prioritization, referral, and active list management purposes).

**H. Data and Record Management:**

- 1) Data protection for different federal and local privacy laws needed (HIPAA and 42 CFR Part 2).
- 2) Collect data at different points including the building of client records for street outreach projects for data prior to Date of Engagement.
- 3) Software has a data dictionary, clear naming conventions and transparency in table structure to support reporting and data import and export.
- 4) Provide historical data and has the ability to archive client level data after 7 years.
- 5) Manage and report sheltered and unsheltered Point in Time (PIT) data.
- 6) Allow for flexible sharing of data by data element, program, and agency in accordance with CoC privacy protocols and the client's wishes.
- 7) Dynamically manage households as members join and depart from the household.
- 8) Resource directory that details the agency and program information as well as program eligibility and real time vacancies to facilitate the coordinated entry process.
- 9) Software provides the ability to make eligibility-informed referrals and track referral outcomes.
- 10) Bed and unit management feature to allow for expedient entry and exit into specific beds and units that feeds to real time vacancy.
- 11) Logical workflow that eliminates redundant data entry and prevents wasted effort of data entry across multiple screens or modules.
- 12) Displays system alerts that detail system-level information, agency-specific information and HMIS user level action items.
- 13) Tool for case management including, case notes, goal plans and housing plans.
- 14) Collect electronic signatures.
- 15) Ability to manage data by various and multiple funding sources.
- 16) Produce e-mail notification for HMIS user level action items.

17) Provide data element and response category definitions within the workflow for HMIS users.

I. **Documents and Reporting:**

- 1) Create a valid CSV export per the current HUD CSV Specifications.
- 2) Ad hoc reporting capabilities accessible to HMIS administration.
- 3) Real time data analysis.
- 4) Import and export data to the latest HUD CSV specifications.
- 5) Ability to print assessments, reports, and documents.
- 6) Software can upload documents to client files.
- 7) Report capabilities that have drill down functionality to assure the data contained within reports is valid.
- 8) Software provides agency and project level reporting capabilities for use by HMIS users beyond HUD and federal partner required reports (client served reports, dashboards).
- 9) Software provides rating and ranking reporting capabilities to aid with the CoC Application.

J. **Software Shall Contain:**

- 1) all the Project Descriptor Data Elements (PDDE) and response categories.
- 2) all the Universal Data Elements (UDE) and response categories.
- 3) all the common Program Specific Data Elements (PSDE) and response categories.
- 4) all individual federal partners Program Specific Data Elements (PSDE) and response categories.
- 5) all Metadata Elements (ME).

K. **Deadlines:** meet HUD and federal partner deadlines for implementing data element, response category and report specification updates.

2. Vendor shall provide:

- A. **Prompt Response:** Respond timely to feature enhancements, issues, errors, or system bugs.
- B. **Customer Service:** Provide dedicated customer service representation for HMIS Administrator(s).
- C. **Testing Environment:** Easily distinguishable testing environment that mirrors the production environment.
- D. **Backup and Restoration:** Provide backup, restoration, and recovery with off-site secured data storage including procedures and emergency technical support.
- E. **Disasters:** Provide a disaster recovery plan.
- F. **Training:** Training; or train-the-trainer on data entry, workflow, security and privacy protocols and reporting.

## VENDOR EMPLOYEES AND EQUIPMENT

1. Vendor must utilize competent employees in performing the work. Employees performing the work must be properly licensed or qualified as required by the scope.
2. At the request of the City, the Vendor must replace any incompetent, unfaithful, abusive, or disorderly person in their employment. The City and the Vendor must each be promptly notified by the other of any complaints received.



**CITY OF OCALA RESPONSIBILITIES**

The City of Ocala will furnish, the following services/data to the Vendor for the performance of services:

1. Access to the City's current software (for purposes of data downloading and/or conversion).
2. Access to City buildings and facilities to perform the work.
3. Provide access to schedules, reports, and other information prepared by/for the City of Ocala pertinent to the Vendor's responsibilities.
4. If working on-site, provide access to internet and/or an office facility for the Vendor, if needed.

**SUB-CONTRACTORS**

Sub-contractors are not allowed on this project.

**SAFETY**

1. All employees of the Vendor who work on-site shall comply with the City's current COVID-19 precautionary measures, protective equipment, or any other local, regional, or COVID-19 CDC guidelines.
2. The Vendor shall be fully responsible for the provision of adequate and proper safety precautions meeting all OSHA, local, state, and national codes concerning safety provisions for their employees, sub-contractors, all building and site occupants, staff, public, and all persons in or around the work area.
3. In no event shall the City be responsible for any damages to any of the Vendor's equipment, materials, property, or clothing lost, damaged, destroyed or stolen.
4. Prior to completion, storage and adequate protection of all material and equipment will be the Vendor's responsibility.

**WARRANTY**

1. Vendor will provide a three year warranty from the date of software acceptance by the City.
  - A. Software will, for the Warranty Period, substantially conform to the applicable City requirements. For any breach of this warranty, Vendor will, at its option and expense, either replace the software or correct any reproducible error in the software reported to Vendor by City in writing during the Warranty Period.
  - B. If Vendor determines that it is unable to replace the software or correct any error, Vendor will refund to City the amount paid by City for the software and related services, and the license will terminate the contract.
2. All software developer warranty documentation must be provided before final payment request.

**INVOICING**

All original invoices will be sent to: Holly Lang, Fiscal Manager, Community Development Services 201 SE 3<sup>rd</sup> St, 2nd Floor, Ocala, FL 34471, email: [hlang@ocalafl.org](mailto:hlang@ocalafl.org).



*WellSky Community Services* is an investment that will meet your HMIS needs now, and into the future as your CoC expands its services and programs for your community.

## Experience; Project Team; References

### A. Proposer Information and Contact:

WellSky Corporation  
11300 Switzer Road  
Overland Park, KS 66210  
[www.wellsky.com](http://www.wellsky.com)  
855-WELLSKY  
FEIN: 11-2209324

Project Manager:  
Kouri Linder, Manager of Professional Services  
[Kouri.Linder@wellsky.com](mailto:Kouri.Linder@wellsky.com)  
(913) 307-1101 X19015

### B. Experience:

WellSky anticipates that the following individuals will be assigned to work with the Marion County CoC project team:

#### **Implementation Consultants:**

Tyler Pidgeon – Tyler has over 12 years of experience in the Social Services/HMIS industry. During the last three years with WellSky, Tyler has worked with implementations from the initial requirements and business analysis, through configuration, user acceptance testing and training, to go-live and post-go-live technical support. He also has extensive experience with training, data conversion/migration, and report writing.

Jody Miller – Jody has over 17 years of experience in the Information Technology and Project Management fields with a focus on the non-profit, grant-funded sector. Jody has experience with implementations from the initial requirements and business analysis, through configuration and training, to go-live and post-go-live follow-up. She also has experience in training, report writing, and non-profit management. Prior to starting at WellSky, Jody worked as a System Administrator on *WellSky Community Services* for 8 years.



Implementation Consultants are involved in all five phases of a *WellSky Community Services* implementation: Plan, Design, Configure, Deliver, and Go-Live.

**Data Services Engineer:**

Justin Martin – Justin has over 10 years of experience in the software and technology industry implementing business technology solutions with a focus in the Homeless Management Information Systems (HMIS) area. Justin has project experience from gathering initial requirements, coding the project, internal QA, user acceptance testing, to go-live and post-go-live technical support. He mentors junior programmers and acts as an advisor to many internal departments.

The Data Services Engineer is involved in four phases of a *WellSky Community Services* implementation: Design, Configure, Deliver, and Go-Live.

**Professional Services Manager:**

Kouri Linder – Kouri has over 10 years of experience in Information Technology, two of which are specific to Homeless Management Information Systems (HMIS). Kouri has extensive knowledge of the custom project implementation lifecycle, including legacy data migration, software integration and project management. With WellSky, he has worked together with the Professional Services resources to maximize the client's experience with *WellSky Community Services*, ranging from initial legacy data migrations to optimizing implementations via customized training for the most tenured *WellSky Community Services* Clients.

The Professional Services Manager serves as an escalation point throughout all five phases of a *WellSky Community Services* implementation: Plan, Design, Configure, Deliver, and Go-Live.

Additional supporting team members include:

**Product Owner:**

Steve Millard – Steve has over 17 years of experience related to Homeless Management Information Systems (HMIS), including over 12 years as a WellSky teammate. Steve has served in various roles, including Training, Consulting, and Report Development. In his current role as Solutions Analyst for *WellSky Community Services*, Steve draws upon his many years of experience within the industry and with WellSky's HMIS solution to help define the solution road map and to serve as a direct liaison with the Engineering team. Steve has extensive experience working with and involving our client community in focus groups and client interview processes to continuously improve the *WellSky Community Services* solution.

**Client Care Manager:**

Kristy Hudson – After 13 years as a Senior Client Care Representative with WellSky, Kristy now leads the Client Care Team for *WellSky Community Services*. During her tenure at WellSky, she has amassed a wealth of knowledge and expertise with the HMIS solution and industry.

**HUD Compliance Manager:**

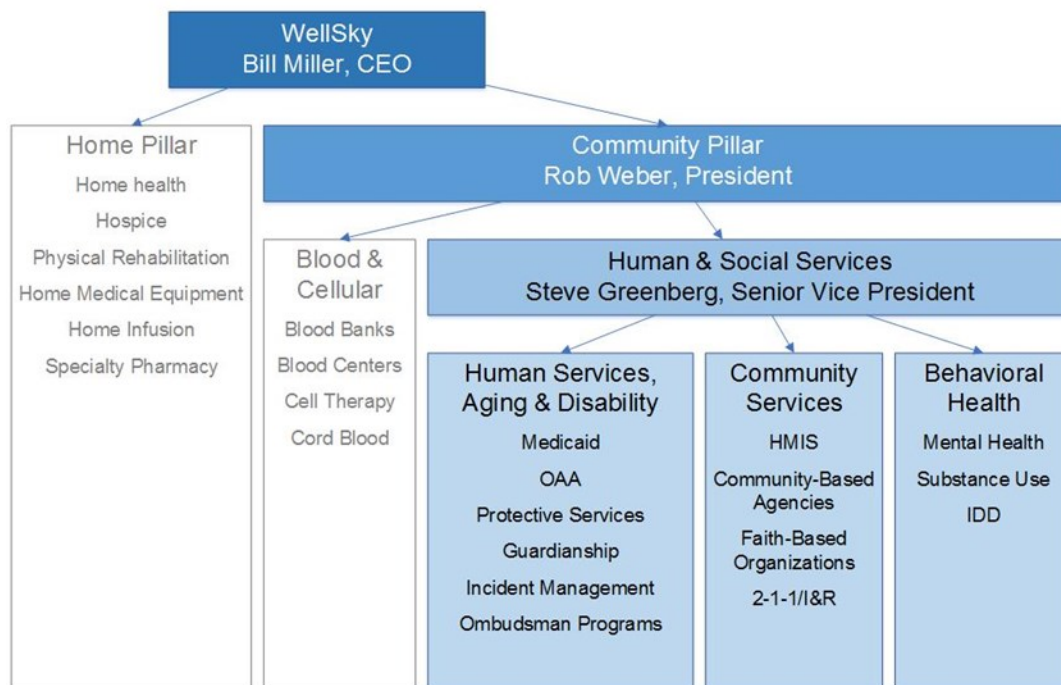
Candice Wiseman has over a decade of experience with the HMIS solution, working to develop and integrate HUD/Federal Partner Standards with *WellSky Community Services*. Candice, as



the HUD compliance manager, focuses on ensuring industry compliance; coordinating with solutions management; representing WellSky at HUD Software Solutions Provider meetings; attending HUD and Federal Partner National Conferences preparing federal, state, and local report specifications; and answering technical assistance questions. Her hands-on expertise in the field ensures that WellSky's reports to HUD, the VA, and HHS are not only accurate, but are also easy for users/system administrators to access, run, and submit.

WellSky is pleased to provide a company organizational chart and resumes for the main project team on the pages following. Page numbering is non-sequential.

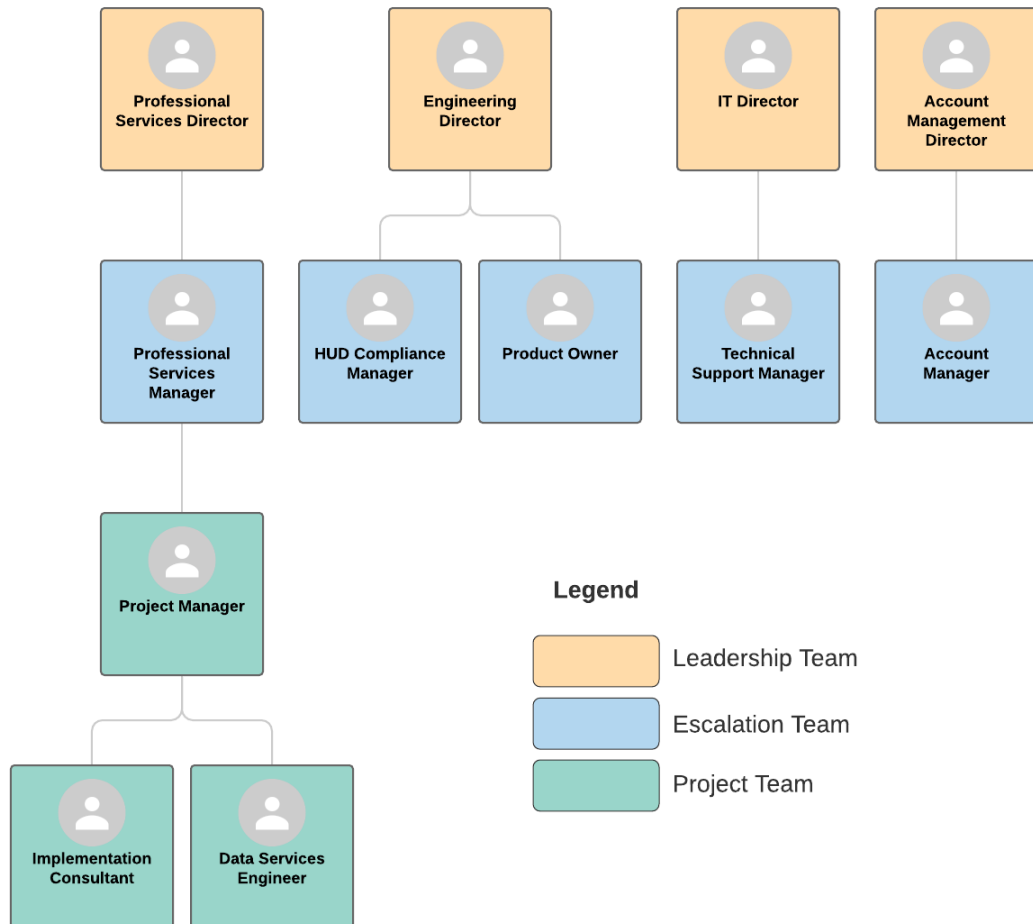
Organizational Chart  
Human Services at WellSky



WellSky is pleased to provide resumes for the implementation services teammates proposed for this engagement as separate documents attached to the bid.

## C. Project Team:

1. Discuss staffing plan, workload, both current and anticipated, for all key team members, and their capacity to perform the requested services.



WellSky has experienced, long-serving teammates who will ensure that Marion County CoC is supported by the best-in-class staff, particularly when it comes to the implementation of a HUD and other federal partner compliant data system. WellSky's HUD compliance manager, Candice Wiseman, has over a decade of experience working to develop and integrate HUD standards within *WellSky Community Services*. WellSky's Client Services and Customer Support team have industry knowledge gained from working at community service providers and are also knowledgeable with HUD regulations and guidelines. WellSky compliance team members work closely with WellSky's product development team members to ensure product compliance with HMIS regulations. A key goal is that WellSky solutions are flexible and built with full anticipation



of future changes to HUD and other partner guidelines. This focus on our teammates' experience, knowledge, and skill is an important part of *WellSky Community Services'* success.

The Marion County CoC's administration team will work directly with WellSky's Project Manager, Professional Services manager, Customer Support manager, and Account Manager to determine the scope and scale of the intended *Community Services* implementation. Communication will primarily be with the Project Manager and the Implementation Consultant(s) to outline the design of the *Community Services* implementation. Given the years of experience in implementing and supporting an HMIS for over 230 CoC's, WellSky has the knowledge to anticipate and deliver the level of staffing that will be needed to successfully support the implementation.

WellSky Project Managers have broad experience designing project plans, managing data migrations, allocating resources, and meeting crucial deadlines. Project Managers are not only familiar with Implementation Services and Data Services work, but often participate directly in various stages of both Implementation Services and Data Services projects, allowing for an unparalleled depth of knowledge. Based on this experience, generating an appropriate project plan - and then executing the plan to specifications - is a WellSky standard.

2. Specify the names of the persons who will be authorized to give and support information, both in writing and oral presentation for your company, provide their titles, addresses and telephone numbers.

During implementation, WellSky's team members working with the CoC will be available by phone and email to assist the CoC team in accordance with the implementation plan. The proposed team members are:

Tyler Pidgeon, Implementation Consultant

[Tyler.Pidgeon@wellsky.com](mailto:Tyler.Pidgeon@wellsky.com)

(318) 213-8780

11300 Switzer Road

Overland Park, KS 66210

Jody Miller, Implementation Consultant

[jody.miller@wellsky.com](mailto:jody.miller@wellsky.com)

318.213.8780 x24309

11300 Switzer Road

Overland Park, KS 66210

Kouri Linder, Manager

[Kouri.Linder@wellsky.com](mailto:Kouri.Linder@wellsky.com)

(913) 307-1101 X19015

11300 Switzer Road

Overland Park, KS 66210

**Coalition of Homeless Services Providers**

Roxanne Wilson, Executive Officer

Seaside, CA

(831) 204-7850

[rwilson@chsp.org](mailto:rwilson@chsp.org)

CHSP has been a WellSky client since 2019 and has 150 users. They are also utilizing on/off site tracker and the service scan module.

## Software Solution; Implementation and Training Plan

### E. Approach and Software Solution:

#### Approach

WellSky can meet Marion County CoC's HMIS goals with a standard implementation of *WellSky Community Services* that enables robust coordinated entry processes, project enrollment tracking and outcomes evaluation, real-time emergency shelter and housing availability information, and the ability to meet local and Federal reporting requirements. WellSky's Professional Services team has extensive experience implementing this solution, training local administrators on how best to maintain the implementation over time, and training the end users on the most efficient data entry workflows.

WellSky has a proven Implementation Methodology built on years of successful deployments of its products. WellSky's approach to effectively implement a new HMIS for Marion County CoC will leverage this same methodology. Although each customer's goals and tasks are specific to its deployment, the structure of WellSky's methodology aligns expectations and helps implementations through a series of five phases developed to ensure high quality and predictable delivery, as follows:







## Plan

Initiation · Roles & responsibilities · Project charter · Project schedule  
Kick-off · Technical readiness · Design phase preparation · Training



## Design

Gather requirements · Document requirements  
Review requirements · Approve requirements



## Configure

Application · Interface(s) · Data migration  
Reports · System testing



## Deliver

**Validate:** Plan test activities · Application · Interface(s)  
Data conversion · Reports · Remediate issues  
**Training:** Plan training · Prepare training materials · End user training



## Go-Live

Plan deployment · Go-live · Go-live support  
Transition to support · Project closure

### *Plan Phase*

WellSky's Professional Services team will work with Marion County CoC to confirm project scope, define the project schedule, and identify project resources. This phase requires Project Management, Information Technology, and Business Ownership resources. Marion County CoC approval of the project scope and schedule is critical in this phase and is required to move to the Design phase to ensure all parties agree on the path forward.

### *Design Phase*

The WellSky Implementation Consultant coordinates and leads design discussions based on best practices, while maintaining awareness of project scope. All solution requirements are documented through an iterative design and configuration process. When applicable, Marion County CoC resources are actively engaged in design discussions, screen mockup reviews, and the generation of requested deliverables prior to final design requirements approval. Design

approval allows the project team to predict and create validation artifacts, as well as give key stakeholders a vision of the to-be solution.

### *Configure Phase*

The solution components are configured and tested during this phase based on the design document details. The process may repeat during this phase as the initial configuration is finalized. During the configuration process, WellSky will perform system testing activities on the configured solution to ensure each setting functions as defined according to what is in the design documents. WellSky will perform a final round of system testing on the final configured solution to ensure all design components are addressed and functioning as defined prior to exiting the Configure phase. The customer assigns a System Administrator prior to the start of the Configure phase to allow for the knowledge transfer to begin.

### *Deliver Phase*

During the Deliver phase, the system validation and training is completed. The team validates the solution and provides approval for training. Training will consist of train-the-trainer as well as end-user training if applicable.

### *Go-Live Phase*

The Go-Live phase follows the delivery from testing to the live production environment. WellSky's Customer System Administrator plays a key role in initial support with WellSky resources providing the support and tools to allow for successful ongoing support of the solution. Customers are encouraged to designate their system administrator as the first line of support during this phase, but Professional Services remains available as needed. After go-live tasks are completed, a formal transition to WellSky Customer Support takes place. A hand-off call introduces the WellSky Support team to the Marion County CoC Project Team and establishes processes for contacting, managing, and tracking any ongoing support items.

### *Legacy Data Migration*

WellSky will leverage extensive experience migrating data from legacy systems into *WellSky Community Services* to provide complete vendor management of the migration process. WellSky and client collaboration, coordination, and communication every step of the way are part of the formula for a successful data migration process.

Client involvement in the data migration project will help ensure its success. Some of the tasks the client may participate in include but are not limited to:

- Assistance and review of the data field mapping between systems
- Assistance in identifying logical data collection and business rules differences between systems and potential remediation needed during the data migration process
- Validation of project results and/or identification of any issues to be remedied via extensive review of a demo environment

- Helping WellSky staff understand any other community-specific data or legacy system nuances that may impact the data migration project

WellSky will perform initial review and QA testing of the data migration process before delivery. Prior to completing the data migration project in a production environment, a demo environment will be provided for customer review and approval. WellSky staff will work with the client to remedy any outstanding issues prior to the production environment migration.

### *Go-Live*

WellSky will develop a deployment plan with Marion County CoC that addresses go-live criteria and go-live support approach.

Upon completion of training, the project team will hold a go-live checkpoint meeting to review go-live criteria and confirm the scheduled go-live event. On the scheduled go-live date, end-users will begin using the system at which point the system will be considered “live.” For an initial period after go-live, the WellSky project team will remain engaged to support the Marion County CoC System Administrator in triaging and managing any necessary corrective actions. Once the project team has confirmed operational stability, WellSky will transition support responsibilities to the WellSky Customer Support team.

### *Data Imports and Exports*

Should member organizations of the Marion County CoC have a need to import data from other systems, the WellSky Professional Services team has extensive experience importing data from a variety of sources and uses different methods for completing the imports that have been tailored for distinct types of importing needs. For smaller imports, automated processes can be established to receive, transform, and import data on a recurring basis. For large, one-time batch imports of historical data, the team will manually start transformation and import processes, including data validation checks of the source data. The time it takes to complete these processes is dependent on the amount of data to be managed. The WellSky DevOps team is available to scale infrastructure resources, as needed, to ensure the imports complete within a timely fashion as is warranted for the type of import request.

*WellSky Community Services* includes several standard export payloads (e.g., HMIS .CSV, RHY Export, etc.), each of which have the potential to export large amounts of data. These exports are generated on demand by System Administrators, but the WellSky Professional Services team can assist with the automation of these exports, if needed. Custom export payloads can be developed, as well, if a partner has requested a specific set of data in a specific format. As with imports, the time it takes to generate an export is dependent on the volume and complexity of the data to be exported. The WellSky DevOps team is available to increase available infrastructure resources and/or optimize queries to ensure exports complete within a timely fashion as is warranted for the type of export request.



WellSky supports data integration with other data platforms through a variety of methods. Each data integration project's requirements dictates which method is most appropriate. Some examples include batch import/export processes to move data into and out of *WellSky Community Services*. These can be completed manually or through automated processes as needed. Newly released APIs support third-party systems' real-time access to data stored within the *WellSky Community Services* database. Access to the data is governed by the same data sharing rules that determine what named users can access within the application and through reporting tools. The WellSky Professional Services team has extensive experience assisting clients to achieve their data integration goals.

### *Business Continuity*

WellSky follows industry best practices for Business Continuity and Disaster Recovery Plan. WellSky Disaster Recovery (DR) employs a two data center approach including a Production environment and a DR environment which are geographically dispersed. This DR site is on standby in case of a catastrophic event that renders the production facility inaccessible or unusable.

WellSky contingency plan involves the following key components:

- Routine Business Impact Analysis (BIA). This exercise inventories all critical components of the SaaS operation and results in a prioritization of risk to the SaaS operation. WellSky also conducts a BIA for corporate systems, including client service, finance, human resources, and corporate email.
- Redundant SaaS architecture.
- Backups stored locally in the production data center. Replication of backups nightly to our DR data center.
- Two site data center design for Disaster Recovery (DR), designed for recovery in the event of a disaster affecting the production data center
- A contingency/ Continuity of Operations Plan (COOP) that enables WellSky workers to work remotely or in alternate offices in the event of damage affecting the WellSky offices.
- Designation of key personnel assigned to DR procedures with routine updating of contact lists.
- Collection of key vendor and supplier and contract information in case needed to support recovery efforts.
- Detailed technical recovery strategies, disaster declaration procedures outlined in the WellSky SaaS DR plan.

An annual tabletop exercise is conducted for the WellSky SaaS operation by an independent third party specializing in business continuity and disaster recovery.

### *Software Solution*

*WellSky Community Services* is comprised of different modules that have been designed to meet the specific data collection and reporting needs of Continuum of Care agencies. These



modules provide System Administrators the tools they need to tailor the user experience to best fit each user's role so that they only have access to the screens and modules needed to do their job. This tailored user experience begins when the user logs into *WellSky Community Services* and lands on their Home Page Dashboard. The dashboard provides useful information, such as news and tasks that need to be completed. Referrals and reports that are important to the user can also be pinned to their dashboard, giving the user easy access to important data all on one screen.

The core module of *WellSky Community Services*, ClientPoint, collects and displays active and historical data about each client. The first screen in ClientPoint provides users with the means to search for existing clients within the system using a variety of parameters to make sure an individual isn't already in the database. To ensure that duplicate records are not created, the search function does a "smart" search, returning a list of clients who may potentially match but have demographic information that may include different spellings, capitalizations, nicknames, etc. from the original search parameters. Anonymous records can also be added from this screen.

When a client's record is selected from the search results, the user can view important information quickly and easily on the Client Summary tab. This tab is configurable by project and can include information such as Service history, Case Plans, Incidents, current and previous project enrollment, and Case Manager assignments. A photograph of the client can be uploaded so that it displays on the Client Summary and the Client Profile page. This is another safeguard to ensure that the proper client record is being accessed by the end user. Within the client record, users can perform functions such as uploading files, updating client information, completing required project enrollment/update/exit data collection, and tracking service transactions.

*WellSky Community Services* contains a Household feature within the client record, where multiple client records can be linked together to form a "Household." This functionality easily identifies family members or people who may receive services and/or program enrollments together. Clients can be added and removed from the Household as needed and historical data is retained on the client and household record.

The client's Release of Information, or ROI, is captured in the client record. *WellSky Community Services* utilizes the ROI to allow the client to control what information is shared from their record and which agencies/projects have access to that information through WellSky's robust data sharing model. Data from the client record is grouped into logical sets (e.g., Assessments, Project Enrollments, Goals, Services, etc.) to be shared to those agencies/projects that the client has granted permission.

Assessments can be configured by System Administrators that are available to users with the correct role-based permissions to complete in the client record. These assessments can be created to capture information needed to make referrals to organizations and programs for services and placement. Prioritization tools can be utilized in assessments to ensure that the



individuals with the greatest need receive services quickly. Assessment data also can be used to determine a client's eligibility for services and programs using the optional Eligibility Module. System administrators can set up eligibility criteria for services and the module uses the client's assessment data to determine which services and provider agencies can best meet the client's needs. The end user will receive a response from the module that lists the provider agencies for which the client is Eligible, Potentially Eligible, and Ineligible to receive services. If a Potentially Eligible response is received, the user is prompted to complete more information to verify if the client is eligible. If a client is ineligible, an explanation will appear to show why the client does not meet the eligibility requirements.

Unit Manager is *WellSky Community Services*' most recently redesigned module, designed to manage bed and unit inventories. Users can easily locate available units (e.g., beds, rooms, apartments, etc.), check a person or household into one or more units, reserve specific units, or simply make referrals to unit lists. With each check-in and check-out, the unit inventory is updated in real-time so that all users have visibility into up-to-date vacancy information. This module supports a step-by-step data entry workflow that guides the user to complete all necessary actions to fully execute a check-in or check-out process, including the ability to create Project Enrollments and/or Project Exits, as applicable. This information is available for reporting so that enrollment and unit stay information can be cross-referenced.

*WellSky Community Services* includes an Admin Dashboard, which gives System Administrators the ability to configure the system to best suit their CoC's needs. Within this dashboard, System Administrators can establish data sharing rules to govern which participating organizations can access any given client's information and specifically what information is accessible to the organizations that did not enter the data. It is from this dashboard that user information can be managed and maintained, including role-based permissions, project affiliations, user licenses and when their access to the system will expire. Provider accounts can also be managed to give provider agencies access to various aspects of the system, such as specific modules and assessments. System Administrators can use the Admin Dashboard to create assessments and data elements, as well as worksheets specific for providers. If a user has difficulty using the system, a system administrator can shadow that user to help trouble shoot the issue.

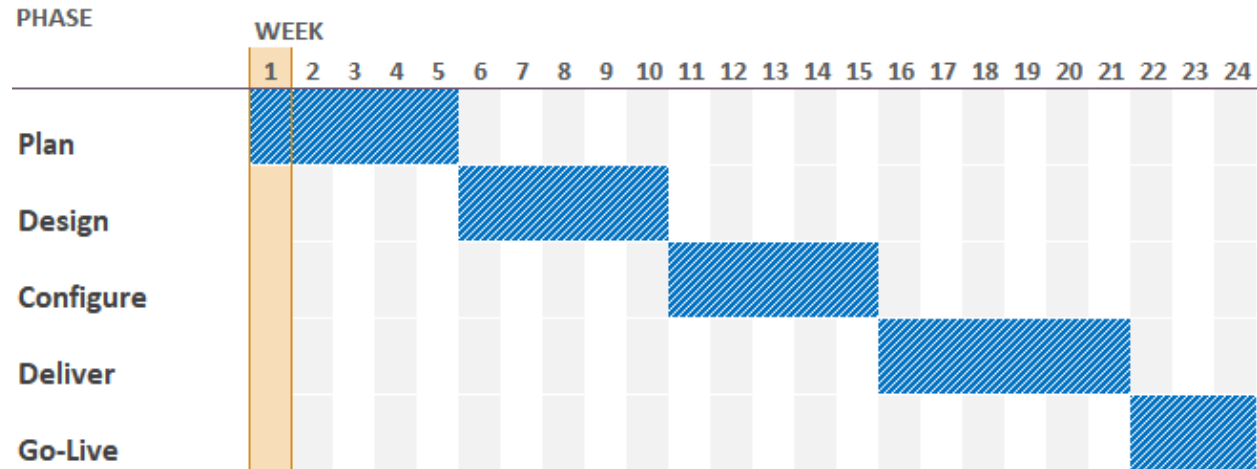
*WellSky Community Services* has robust reporting capabilities, ranging from audit reports and standard reports such as the ESG CAPER and PATH, to ad-hoc reporting. Ad hoc reporting offers organizations several methods to use when generating reports. Report Writer pulls simple count reports and can be downloaded in a .CSV format. For more advanced reporting needs, WellSky offers fully integrated access to both Business Objects ("Advanced Reporting Tool" or "ART" for short) and to Qlik Sense, which is a data visualization and analytics tool. Both reporting tools follow the data sharing model rules the application follows in order to ensure all users have access to custom report functions while also ensuring only the data a particular user is supposed to "see" is accessible via reports. All data captured in *WellSky Community Services* is fully reportable, so clients can design custom reports for additional analysis. Many clients



choose to modify a local copy of the WellSky standard reports to minimize the initial design and development effort.

## F. Implementation and Training Plan:

For this implementation, the Project Timeline has been identified as 180 days.



### Plan Phase - Weeks 1 through 5

Key contributors include the WellSky Project Manager and Implementation Consultant

Key deliverables/milestones include:

1. Implementation Kick-Off Meeting
2. Planning sessions with Project Manager

### Design Phase - Weeks 6 through 10

Key contributors include the WellSky Project Manager, Implementation Consultant and - depending on the scope of the project - the Data Services Engineer.

Key deliverables/milestones include:

1. Design sessions with Implementation Consultant
2. Design sessions with Data Services Engineer (if applicable)
3. Sign-off on implementation design

### Configure Phase - Weeks 11 through 15

Key contributors include the WellSky Project Manager, Implementation Consultant and - depending on the scope of the project - the Data Services Engineer.



Key deliverables/milestones include:

1. Implementation Consultant will build the designed solution in the Live site alongside the Marion County CoC-defined System Administrator to allow for gradual knowledge transfer and clarity of design implications.
2. Overall System Administrator Train the Trainer sessions will begin in earnest.
3. If applicable, Data Services Engineer will begin coding the necessary solution(s), as designed
  - a. Completion of internal peer review of scripted solution(s)
  - b. Comprehensive testing of scripted solutions will occur

#### Deliver Phase - Weeks 16 through 21

Key contributors include the WellSky Project Manager, Implementation Consultant and - depending on the scope of the project - the Data Services Engineer.

Key deliverables/milestones include:

1. Implementation Consultant will validate and test the configured solution with the Marion County CoC System Administrator.
2. Implementation Consultant will complete Train the Trainer sessions
  - a. Sessions will evolve to include more complex areas of interest, including Reporting.
3. If applicable, WellSky Project Manager and Data Services Engineer will begin coordinating with WellSky DevOps to implement necessary procedures to enable created solution(s)
4. WellSky Project Manager will coordinate Go-Live scheduling with Marion County CoC project team, Implementation Consultant and, if applicable, the Data Services Engineer

#### Go-Live Phase - Weeks 22 through 24

Key contributors include the WellSky Project Manager, Implementation Consultant and - depending on the scope of the project - the Data Services Engineer.

Key deliverables/milestones include:

1. WellSky Project Manager and Implementation Consultant will closely monitor the Marion County CoC Go-Live to ensure success.
2. Implementation Consultant will troubleshoot and advise throughout Go-Live, allowing Marion County CoC a specific, knowledgeable resource, as needed.
3. WellSky Project Manager and Data Services Engineer will task WellSky DevOps to activate any designed Data Services solution(s)
4. Once Go-Live is complete, WellSky Project Manager will schedule and complete the Professional Services to Support Hand-Off, which will signify the completion of the Professional Services portion of the *WellSky Community Services* implementation.

## Training

WellSky will develop a comprehensive Training Plan with Marion County CoC that addresses user preparation for initial system deployment, ongoing training for new and existing users, and ongoing support and communication to users. The Training Plan will define the approach to schedule, delivery, curriculum, agendas, and evaluation of training.

WellSky uses a “see/do” approach to end-user training facilitation where users first watch the presenter demonstrate a workflow segment and then repeat those steps to practice the workflow. WellSky will deliver training in close coordination with deployment so that users can “use it” before they “lose it.” Users will be given access to a nonproduction environment for practice and review after training and before go-live to maintain and reinforce their recent learning.

WellSky will design and deliver onsite training and materials that include:

- Business process background for context
- Targeted learning objectives
- Step-by-step user workflows
- Application screenshots
- Callouts for key points and tips
- Practice exercises
- Self-directed quizzes

## Price Proposal

### G. Price Proposal:

Provide a detailed price proposal based on PRICING section in the Scope of Work in compliance with all requirements outlined herein and in the exhibits.

#### WellSky Community Services Pricing Table

FL-514 - Ocala/Marion

WellSky Community Services License Count Summary	
Item	Quantity
WellSky Community Services (ServicePoint) - User License	50
WellSky Community Services (ServicePoint) - Reporting User - Premium (AdHoc)	2
WellSky Community Services (ServicePoint) - Reporting User - Basic (Report Viewer)	48

Professional Services One-Time Fees			
Qty.	Per Unit	Item	One-Time



1	\$30,855.00	Professional Services - Remote Implementation - Single HUD Workflow Includes the following items: - Kick Off Call - Business Analysis to provide design recommendations on configuration of workflow - Provider Set Up – WellSky to create up to 20 providers* - HUD Workflow Set Up – WellSky to create a single HUD Workflow* - User Set Up – WellSky to create up to 50 users* - Assessment Creation and Customization - WellSky to create a Single Assessment* - System Testing based on Design - Agency Administration Training (up to 6 System Administrators or additional cost for training will apply for additional training sessions) - End User Training (up to 1 day) - Go Live Support - Two dedicated Remote Training weeks during Project (up to 4 days for each week) *WellSky uses a Train the Trainer methodology so that any excess workflows, providers, users or assessments may be created by the newly trained System Administrator <b>(20% discount from \$30,855.00 to \$24,684.00)</b>	\$24,684.00
1	\$15,000.00	HMIS .CSV Data Import from Charity Tracker <b>(\$15,000.00 discounted to \$10,000.00 - must be HUD .CSV Data Import Format)</b>	\$10,000.00
<b>Sub-Total Professional Services One-Time</b>			<b>\$34,684.00</b>

One-Time Fees			
Qty.	Per Unit	Item	One-Time
1	\$3,000.00	Community Services - Software License Fee <b>(\$10,000.00 discounted to \$3,000.00)</b>	\$3,000.00
<b>Sub-Total One-Time Fees</b>			<b>\$3,000.00</b>

<b>Total One-Time Fees</b>	<b>\$37,684.00</b>
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Cloud Services Fees Billed on a Per License Basis			
Qty.	Per License	Item	Annual
50	\$445.00	Community Services - Per User Fee - Tier I: Fees include One-Time Fees, Software Maintenance, Enhancement and Customer Support, Hosting, and Reporting, up to two (2) Premium Reporting Users per 50 CS License, AIRS Taxonomy and SSL Certificate for each implementation. <b>(\$445.00 discounted 15% to \$378.25)</b>	\$18,912.50
1	\$3,150.00	Community Services - Training Site <b>(Year One Fee waived. Year Two - \$3,150.00 will incur unless removed upon renewal)</b>	\$0.00
<b>Total Cloud Services Fees Billed Annually on a Per License Basis</b>			<b>\$18,912.50</b>

<b>TOTAL FEES (Year One includes One-Time, Professional Services Recurring and Annual Cloud Services Fees)</b>	<b>\$56,596.50</b>
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FORECASTED YEAR 2 FEES (Includes Professional Services Recurring and Annual Cloud Services Fees, if retaining the training site. <b>Otherwise, the forecasted fee will be \$18,912.50</b> )	\$22,062.50
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## H. Additional Relevant Information:

Include any other information your firm believes to be relevant.

*WellSky Community Services* offers an optional Eligibility Module that ensures proper referrals are made to CoC member organizations. This module automatically matches a client's assessment responses to member organizations' eligibility requirements. Users can view those organizations whose eligibility requirements are met by the client and make a referral in a few simple clicks. Users can also view the reasons a client was deemed ineligible for services from specific organizations and answer additional questions if there wasn't enough information to determine their eligibility. Some WellSky clients use the Eligibility Module in their Coordinated Entry workflow to make referrals to a centralized Coordinated Entry Provider. Referrals can be made quickly and easily from the Eligibility Module, streamlining the referral process while standardizing client referrals.

Fund Manager is also an optional module that can enhance Ocala's use of *WellSky Community Services*. This module provides seamless grant management in real-time while integrating with client records. Funding cycles can be created for each fund to establish start and end dates, fund amounts and providers who have access to those funds. Fund requests can be made from within the service detail record, creating an efficient process for staff. Once fund requests are created, they are sent to approval queues, providing oversight to the distribution of funds prior to funds being disbursed. Vouchers can even be generated and printed from the application for clients to take to a participating vendor, such as a local grocery store. Fund Manager is a powerful and valuable tool, equipping Ocala with a full understanding of how funds are spent, and which clients have been assisted using those funds.

Additionally, WellSky is pleased to announce that *WellSky Mobile* will be available to *WellSky Community Services* clients in summer of 2022. This mobile application encourages client engagement by giving clients access to information right at their fingertips. Clients will be able to use their mobile device to access their HMIS records, complete intake forms, communicate with their Case Manager and locate nearby resources through a resource search engine. Case Managers will be able to send push notifications to their clients through the mobile application to provide clients with real-time information such as upcoming street feedings or program openings. This innovative use of technology can transform the way individuals experiencing homelessness interact with service providers by providing low barrier opportunities to engage systems of care.

In conjunction with the above-mentioned modules, WellSky's Professional Services team is available to assist in enhancing Ocala's use of *WellSky Community Services*. Professional



Services team members have comprehensive knowledge in the HMIS field. This knowledge combined with experience in *WellSky Community Services* uniquely positions Professional Services to help *WellSky Community Services* clients augment their use of the application. Some functions available through Professional Services include operational assessments, data services and APIs.

WellSky Professional Services can perform operational assessments of a client's current use of *WellSky Community Services*. Team members review the current system configuration and usage which is used to inform suggestions on how to improve the current implementation based on best practices and system design. This is particularly useful for implementations of *WellSky Community Services* that were initially configured many years ago.

WellSky Professional Services offers an array of data services as well. This can include assisting with data imports and exports, data integrations with third-party applications and data clean-up of historical data. Utilizing recently released API functionality, the Professional Services team can assist in granting third-party applications real-time access to client and provider data stored within the *WellSky Community Services* database.

From helping clients achieve operational stability to reaching their data integration goals and everything in between, WellSky Professional Services has extensive experience with helping WellSky clients optimize their use of *WellSky Community Services*.