

Compiled by:

enFocus, Inc.

October 2021

## Proposal Summary Sheet

**Name of Organization** City of South Bend

**Summary of Proposal** This proposal outlines enFocus efforts to support the City of South Bend: Fellowship Placements and Embedded Talent positions at the Department of Innovation and Technology.

**Total Requested Amount** \$285,000

**Proposed Contract Duration** October 1, 2021 – December 31, 2022 **Name of**

**Organizational Contact** Denise Linn Riedl

**Title of Organizational Contact** Chief Innovation Officer

**Address of Organizational Contact** County-City Building 227  
W Jefferson Blvd  
South Bend, IN, 46601

**Email of Organizational Contact** [driedl@southbendin.gov](mailto:driedl@southbendin.gov)

**Project Contact**  
(574)-235-5854

**Telephone Number of Organizational Contact**

Gillian Shaw, Director of Projects

**Name and Title of enFocus Project Contact**

[g.shaw@en-focus.org](mailto:g.shaw@en-focus.org)

**Email Address of enFocus Project Contact**

(732)-927-3889

**Telephone Number of enFocus**

# Letter of Engagement

## enFocus Company Sponsorship Terms

We want you to understand the basis under which we offer our services to you and determine our fees, as well as to clarify the relationship and responsibilities between your organization and enFocus. These terms are part of our engagement letter and apply to all future services, unless a specific engagement letter is entered for those services. Each of these terms shall survive and apply after termination of this agreement.

This Consulting Agreement (the "Agreement") is entered into on , 2021, by and between The City of South Bend, Indiana, a Indiana municipal corporation, acting by and through its Department of Innovation and Technology, having its principal offices 227 W. Jefferson Blvd., South Bend, IN 46601 (hereinafter referred to as "Sponsor"), and enFocus, a 501 c (3) organization, having its principal offices at 635 S Lafayette Boulevard, South Bend, IN 46601 (hereinafter referred to as "Consultant").

WHEREAS, the Sponsor desires to obtain the services of Consultant, and Consultant desires to provide consulting services to the Sponsor upon the terms and conditions in this Agreement.

## AGREEMENT

### SECTION 1 – CONSULTING PERIOD

(a) Term - The Sponsor hereby retains the Consultant and Consultant agrees to render to the Sponsor those services described in Scope of Services, Exhibit A, incorporated by reference and attached hereto, for the period (the "Consulting Period") commencing on October 1, 2021 and ending on January 15, 2023.

(b) Termination - At any time, either party may terminate, without liability, the Consulting Period for any reason, with or without cause, by giving 30 days advance written notice to the other party. The Sponsor shall pay Consultant for work completed as of the date of termination, provided, however, that the Sponsor will have no obligation to pay the Consultant for any portion of the Consultant's work with which the Sponsor is dissatisfied, as determined in the Sponsor's sole discretion.

### SECTION 2 – DUTIES AND RESPONSIBILITIES

(a) Consultant hereby agrees to provide and perform for the Sponsor those services set forth in Exhibit A.

(b) Consultant will execute its obligations under this Agreement in accordance with the prevailing professional standard of care for projects of similar design and complexity.

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### SECTION 3 – COMPENSATION, EXPENSES, PAYMENT, BENEFITS

(a) In consideration of the services rendered by the Consultant under this Agreement, the Sponsor shall pay the Consultant an amount not to exceed Two Hundred and Eighty Five Thousand Dollars (\$285,000) (the "Contract Amount"), as further specified in Exhibit A.

Notwithstanding the foregoing sentence, the Sponsor will not be required to pay any portion or installment of the Contract Amount if the Sponsor is not satisfied with the Consultant's performance under this Agreement or any default or breach of this Agreement by the Consultant exists, as the Sponsor may determine in its sole discretion.

(b) Payment Terms. Invoices shall be presented as set forth in Exhibit A, and payments are due within 30 days.

(c) Sponsor hereby agrees to reimburse the Consultant for reasonable business expenses incurred by Consultant in performing its work under this Agreement, provided that the Sponsor will not reimburse the Consultant for any expenses unless said expenses were approved in writing by the Sponsor (or its representative) before being incurred by the Consultant.

(d) Benefits. Other than the compensation specified in Sections 3(a), Consultant shall not be entitled to any direct or indirect compensation for services performed hereunder.

#### **SECTION 4 - CONFIDENTIAL INFORMATION**

(a) "Confidential Information" means:

(1) any information given to enFocus by Sponsor and clearly marked, in writing as confidential; and

(2) any information given to enFocus by Sponsor orally that, at the time given, is stated to be confidential, and such statement of confidentiality is reduced to writing within thirty (30) days.

(b) enFocus agrees:

(1) to keep Confidential Information confidential for a period of five (5) years from the date given to enFocus;

(2) not to make use of Confidential Information for any purpose other than to carry out the Consultant's services as specified in Exhibit A;

(3) not to give Confidential Information, in any form, to a third party; and (4) to limit access to Confidential Information to only those enFocus employees who have a need to access it for the performance of the services under this Agreement.

(c) The confidentiality, as stated in SECTION 4 (b), will not apply to information which: (1) is at the time of receipt public knowledge, or after receipt becomes public knowledge through no act of omission on the part of enFocus;

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(2) was known to enFocus, as shown by written records, prior to disclosure by Sponsor;

(3) is received by enFocus from a third party who did not obtain the information from Sponsor; or

(4) is required by law to be disclosed.

Consultant hereby acknowledges and agrees that all property, including, all books, manuals,

records, reports, notes, contracts, lists, blueprints, and other documents, or materials, or copies thereof, that is produced under this Agreement (collectively, the "Proprietary Information"), and equipment furnished to or prepared by Consultant in the course of or incident to rendering of services to the Sponsor, belong to the Sponsor and shall be promptly returned to the Sponsor upon request.

(d) Consultant agrees to hold all Sponsor's Proprietary Information in strict confidence and trust for the sole benefit of the Sponsor and not to, disclose, use, copy, publish, summarize, or remove from Sponsor's premises any Proprietary Information (or remove from the premises any other property of the Sponsor) during the Consulting Period except to the extent necessary to carry out Consultant's responsibilities under this Agreement.

## SECTION 5 - NOTICES

All notices or other communications required or permitted hereunder shall be made in writing and shall be deemed to have been duly given if delivered by hand or mailed, postage prepaid, by certified or registered mail, return receipt requested, and addressed to the Sponsor at:

ATTN: Denise Riedl, Chief Innovation Officer  
City of South Bend Department of Innovation and Technology  
227 W. Jefferson Blvd.  
South Bend, IN 46601

or to the Consultant at:

ATTN: Andrew Wiand, Executive Director  
enFocus  
Studebaker Building 113  
635 S Lafayette Boulevard, Suite 105  
South Bend, IN 46601

Notice of change of address shall be effective only when done in writing and sent in accordance with the provisions of this Section.

## SECTION 6 - AMENDMENTS AND WAIVERS

This Agreement may not be modified or amended except by an instrument in writing, signed by a duly authorized representative of the Sponsor and the Consultant. By an instrument in writing similarly executed, either party may waive compliance by the other party with any

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provision of this Agreement that such other party was or is obligated to comply with or perform, provided, however, that such waiver shall not operate as a waiver of, or estoppel with respect to, any other or subsequent failure. No failure to exercise and no delay in exercising any right, remedy, or power hereunder shall operate as a waiver thereof, nor shall any single or partial exercise of any right, remedy, or power hereunder preclude any other or further exercise thereof or the exercise of any other right, remedy, or power provided herein or by law or in equity.

## SECTION 7 - INTERRUPTION OF SERVICE

Either party shall be excused from any delay or failure in performance required hereunder if caused by reason of any occurrence or contingency beyond its reasonable control, including, but not limited to, acts of God, acts of war, fire, insurrection, laws proclamations, edicts, ordinances or regulations, strikes, lock-outs or other serious labor disputes, riots, earthquakes, floods, explosions or other acts of nature. The obligations and rights of the party so excused shall be extended on a day-to-day basis for the time period equal to the period of such excusable interruption. When such events have abated, the parties' respective obligations hereunder shall resume.

#### **SECTION 8 – SEVERABILITY, ENFORCEABILITY**

If any provision of this Agreement, or the application thereof to any person, place, or circumstance, shall be held by a court of competent jurisdiction to be invalid, unenforceable, or void, the remainder of this Agreement and such provisions as applied to other persons, places, and circumstances shall remain in full force and effect.

#### **SECTION 9 – GOVERNING LAW**

The validity, interpretation, enforceability, and performance of this Agreement shall be governed by and construed in accordance with the laws of the State of Indiana.

#### **SECTION 10 – INDEPENDENT CONTRACTOR**

The Consultant shall operate at all times as an independent contractor of the Sponsor. No employee of the Consultant will be considered or deemed to be an employee of the Sponsor. This Agreement does not authorize the Consultant to act for the Sponsor as its agent or to make commitments on behalf of the Sponsor. The Sponsor shall not withhold payroll taxes, and Consultant shall not be covered by health, life, disability, or worker's compensation insurance of the Sponsor.

#### **SECTION 11 – ABILITY TO ENTER INTO CONTRACT**

Each party represents and warrants to the other party that this Agreement has been duly authorized, executed and delivered and that the performance of its obligations under this Agreement does not conflict with any order, law, rule or regulation or any agreement or understanding by which such party is bound.

#### **SECTION 12 – LIMITATION OF LIABILITY; INDEMNIFICATION**

(a) As a professional organization, the Consultant will perform the services described in Exhibit

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A to the best of their ability, striving to ensure great quality work and minimize errors or omissions. As a result, the Consultant shall not be liable to sponsor for any loss incurred in the performance of his/her services hereunder unless caused by Consultant's negligence. Notwithstanding any provision to the contrary, the limit of Consultant's liability under this Agreement will be equal to the total amount paid by Sponsor to Consultant under this Agreement.

(b) Sponsor agrees, at its sole cost, to indemnify and defend Consultant from and against any damages, claims or suits by third parties against Consultant arising from the performance of Consultant's services hereunder unless caused by Consultant's negligence. Subject to the limitation of liability stated in Section 12(a), Consultant agrees, at its sole cost, to indemnify and

defend Sponsor (and its officials, employees, and agents) from and against any damages, claims or suits by third parties against Sponsor arising from the performance of Consultant's services hereunder unless caused by the negligence of Sponsor (or its officials, employees, or agents).

### **SECTION 13 – ENTIRE AGREEMENT**

This Agreement is the final expression of the parties' agreement with respect to the retention of Consultant by the Sponsor for the services specified herein and may not be contradicted by evidence of any prior or contemporaneous agreement.

### **SECTION 14 – REMEDIES FOR BREACH OF CONTRACT**

The Consultant's failure to complete the services in accordance with this Agreement will be considered a material breach. In the event of such breach, the Sponsor may suspend all payments to the Consultant, terminate this Agreement, and/or pursue any and all remedies available at law or in equity.

### **SECTION 15 – EQUAL OPPORTUNITY; NON-DISCRIMINATION; COMPLIANCE**

In accordance with applicable laws, payments are subject to annual appropriation. If the City Controller makes a written determination that funds are not appropriated or are otherwise unavailable to support the continuation of this Agreement, it shall be cancelled. A determination by the City Controller that funds are not appropriated or are otherwise unavailable to support the continuation of performance shall be final and conclusive.

- Invalidity or unenforceability of one or more provisions of this agreement shall not affect any other provision of this agreement.
- The Consultant shall comply with all applicable laws and regulations in its hiring and employment practices and policies for any activity covered by this Agreement. The Consultant shall comply with all state, federal, and municipal laws, regulations, and standards applicable to its activities pursuant to this Agreement including, but not limited to, the requirements imposed by Ind. Code 22-9-1-10 (non-discrimination), the provisions of Ind. Code 5-22-16.5 (disqualification for dealings with the government of Iran), and the provisions of Ind. Code 22-5-1.7 (requiring E-Verify for new employees and prohibiting

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- employment of unauthorized aliens). Each of the foregoing provisions is incorporated herein as if set forth in full, and the Consultant certifies that it is in compliance with each such provision and shall remain in compliance through the term of this Agreement.
- The Consultant agrees to make a good faith effort to provide and maintain a drug-free workplace and will give written notice to the City within ten (10) days after receiving actual notice that the Consultant or an employee of the Consultant within the State of Indiana has been convicted of a criminal drug violation occurring in the workplace.
  - The Consultant agrees, as a condition precedent to the effectiveness of this Agreement, that its authorized representative will execute and submit to the Sponsor a contractor's affidavit in the form provided by the Sponsor.
  - This agreement is subject to the laws and regulations of the State of Indiana.

By signing this agreement, all parties agree to the terms as described above. Alterations to this

agreement can only be made by both parties and must be placed in writing. Both parties will receive a printed copy of this agreement, and will be responsible for upholding its terms.

(Signature page follows.)

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CITY:

CITY OF SOUTH BEND DEPARTMENT OF INNOVATION AND TECHNOLOGY

By: \_\_\_\_\_

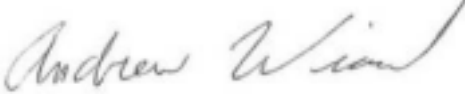
Shawn Delahanty  
Printed: \_\_\_\_\_

Director of IT Services  
Title: \_\_\_\_\_

12/22/2021  
Date: \_\_\_\_\_

ENFOCUS:

ENFOCUS, INC.

By: \_\_\_\_\_ 

Andrew Wiand  
Printed: \_\_\_\_\_

Executive Director  
Title: \_\_\_\_\_

2/2/2022  
Date: \_\_\_\_\_

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## **Exhibit A: Engagement Overview**

### **Fellow Placement and Embedded Talent within Department of Innovation and Technology**

#### **Background and Overview**

##### **Background**

The City of South Bend (CoSB) has supported enFocus through project engagements since the Fall of 2012. enFocus has placed the highest value on this relationship and this has resulted in technology and innovation-based projects for the CoSB.

##### **Overview**

This document details the proposed shape of a 2021-2022 project-based engagement. This model will focus on innovation through seamless strategic technology implementation by using enFocus as value-added, innovative project capacity.



## Engagement Description

The project model places enFocus Fellows with the CoSB's Department of Innovation and Technology (DoIT) to facilitate communication and swift technology implementation and business analysis. This model also embeds unique positions of Application Developer and Local Assistance Lead within the DoIT. Real-time communication lies at the core of this model and is essential to fast-paced technology solutions due to the pivoting nature of such projects.

## enFocus Fellows

enFocus will provide five Project Leads (Francie Fink, Patrick McGuire, Jeremy Prince, Abigail Stokes, and Eliza Vardanyan, enFocus Innovation Fellows) to perform DoIT projects. Fellows will be supported by one or several enFocus Project Managers who provide project guidance and activity scoping and definition. Both Fellows and Project Managers will follow the leadership and guidance of each Project Champion to align resources and enable project implementation. They will operate as independent enFocus employees operating under the enFocus employee handbook, wages, benefits, working conditions and any/all other enFocus policies. Additionally, enFocus's Director of Projects will provide oversight and advice to the team. CoSB's Civic Innovation Director and enFocus's Director of Projects will negotiate additional Project Leads as project needs arise and clearly defined scopes are established. Project resources, interns, and mentors will be added to the project on an as needed basis.

Detailed information of the Fellow Engagement Model, including process, project focus areas, duration, and pricing, is included as Exhibit B.

## Application Developer

enFocus will provide staffing support for the Application Developer (Tugce Sahan) position. In this role, the Application Developer assists primarily with developing data interfaces for CoSB software applications through custom code, configuring other enterprise software applications

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to meet business needs, and developing and maintaining tabular reports and databases for all CoSB departments. The Application developer will operate as a CoSB employee and will be managed as such. Additionally, enFocus's Director of Programs (Melissa Fruscione), will be responsible for:

- Navigating requirements for work authorization
- Ensuring prompt disbursement of wages, benefits, payroll taxes and state and local taxes
- Executing requirements for payroll and accounting administration
- Providing support in utilization of employee benefits

Detailed information for the Application Developer position, including job description, duration, and pricing, and management is included as Exhibit C.

## Local Assistance Lead

enFocus will provide mentorship, guidance and staffing support for the Local Assistance Lead (Elizabeth Shroyer) position. The Local Assistance Lead is a special temporary position created by the City of South Bend and enFocus. It's goal is to work across institutions to be a source of record of all assistance programs relevant to South Bend's most in need households. The Local

Assistance lead will dually report to CoSB's Civic Innovation Director and enFocus's Director of Projects. Additionally, enFocus's Director of Programs will be responsible for:

- Navigating requirements for work authorization
- Ensuring prompt disbursement of wages, benefits, payroll taxes and state and local taxes
- Executing requirements for payroll and accounting administration
- Providing support in utilization of employee benefits

Detailed information for the Local Assistance Lead position, including job description, duration, and pricing, and management is included as Exhibit D.

### Total Engagement Cost

The fee for this engagement is up to \$285,000. CoSB will be invoiced monthly on the first business day of beginning November 1, 2021. Invoices will contain the following line items:

1 enFocus Fellows Hourly \$40/hour

2 Application Developer Salary (\$5000/month + benefits) \* 1.07

3 Local Assistance Lead Salary (\$5541.67/month + benefits) \* 1.07

### Feedback

enFocus places great value on the relationship with the CoSB. Please let us know how we can continue to support the CoSB and its initiatives. We are very excited to participate in whatever way we can to create the highest degree of success for the CoSB.

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## Exhibit B: Fellow Engagement Model

### Fellow Engagement Process

The engagement process structure for the project model shall offer a minimum, but effective, set of guidelines that set expectations for all parties.

- Agreement on project focus areas
- Establishment of project plans to be developed in collaboration with the Project Champion
- Fellows will contribute approximately 2 days of the work week toward their respective projects

### Project Focus Areas

The Project Leads will be responsible for executing DoIT projects. They will work collaboratively with members of all DoIT divisions, other CoSB employees, and community stakeholders to complete projects and maintain programs. However, projects with the DoIT Division will be the primary focus of this engagement. Fellow roles and activities are listed below.

### TRC Program Management & Partnership Assistance

*CoSB Project Champion:* Director of Civic Innovation, Brain Donoghue

*enFocus Project Lead:* Francie Fink

*Description:* See Exhibit E

### **Project Management within Operations**

*Project Champion* Manager of Operations, Matthew Coats

*enFocus Project Leads:* Jeremy Prince and Abigail Stokes

*Description:* See Exhibit F

### **Data Improvement & Analytics Support**

*Project Champion:* Senior Business Analyst, David Finley

*enFocus Project Lead:* Eliza Vardanyan

*Description:* Works with the Senior Business Analyst to support the Data Governance & Improvement initiatives at the city, scoping and often operationalizing data and small analytics projects. These projects include open data releases, open data audits, data cleaning, data visualization, and data analytics (descriptive and predictive).

### **Digital Inclusion and Transformation Planning**

*Project Champion:* Chief Innovation Officer, Denise Lynn Riedl

*enFocus Project Lead:* Patrick McGuire

*Description:* Works with the CIO to perform best practice research of digital inclusion, provide recommendations on how best to address issues facing CoSB residents, design plans toward improving digital practices and literacy among CoSB residents, and execute on pilot engagements

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### **Duration**

- Initiate engagement on October 1, 2021
- End engagement on September 30, 2022

### **Management of Hours**

This contract will equate to 3,500 hours over the course of the engagement, which includes approximately 3 hours per week of manager time.

### **Funding and Timeline**

The fee for this engagement is \$40 per hour for up to 3,500 hours i.e. up to \$140,000. Hours will be recorded for each month and invoiced monthly on the first business day of beginning November 1, 2021.

### **Entrepreneurial Project Flexibility**

At enFocus, we place value on our entrepreneurial focus and approach to projects. We have had historical success for clients when we reserve the option to initiate conversation with the client for a project pivot when we see a better path or opportunity to pursue that can lead to greater success. This is not meant to mitigate enFocus of project responsibility but rather to create a scenario that will produce the most valued outcome for the CoSB.

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## Exhibit C: Application Developer Engagement Model

### Engagement Process

The engagement process structure for the project model shall offer a minimum, but effective, set of guidelines that set expectations for all parties.

- Agreement across parties on talent to fill the position
- Establishment of embedded management practice within the CoSB
- In all ways but payment, the Application Developer will act as a CoSB employee

### Job Functions

- Creates more in-depth, automated functionality for CoSB applications and links disparate CoSB applications through batch scripts, API scripts, ETL (extract, transform, load) jobs, and other custom code.
- Configures other departmental specific software applications to fit municipal processes and procedures.
- Assists other members of IT with implementations of new enterprise software or rolling out new functionality of existing software.
- Evaluates the usage of enterprise software versus the needs of various CoSB

departments in conjunction with Business Analytics group.

- Coordinates and performs patches, updates, upgrades, and any necessary maintenance to enterprise software.
- Seeks out technological process improvement opportunities with the larger IT team to minimize repetitive work in enterprise software.

### Duration

- Initiate engagement on January 1, 2022
- End engagement on December 31, 2022

### Management

The CoSB of South Bend will be solely responsible for management of the Application Developer

### Funding and Timeline

The salary for this position is \$60,000 annually. The individual will also have access to:

- A technology stipend of up to \$1,500
- Health insurance reimbursement through enFocus's QSEHRA plan. This plan provides annual reimbursement up to:
  - \$2,000 for individuals
  - \$4,000 for families

The individual will utilize enFocus systems to request reimbursement. If/when a request is made, the cost will be passed on to the CoSB of South Bend in the following month's invoice. Management and administration of payment incurs a 7% administration fee. The minimum monthly rate would be \$5,350. The maximum monthly rate would be \$7,311.67

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## Exhibit D: Local Assistance Lead Engagement Model

### Engagement Process

The engagement process structure for the project model shall offer a minimum, but effective, set of guidelines that set expectations for all parties.

- Agreement across parties on talent to fill the position
- Establishment of dual management practice across CoSB and enFocus

### Job Functions

- Inventory and track all assistance programs relevant to low-income or vulnerable South Bend Residents.
- Provide the most up to date information, as allowable based on in-place data sharing agreements on assistance programs to internal CoSB teams: Economic Empowerment, 311, etc. Also share regularly with external partners including peers at enFocus, Real Services, St. Joseph County Public Library, La Casa, etc.
- Scope out and execute innovative projects to streamline assistance sign-ups and/or increase sign-ups.
- With CoSB DoIT, spearhead a Local Assistance Navigator Pilot which places neighborhood assistance navigators across the city to provide concierge level support to homes and

residents that need a guiding hand through complicated bureaucratic processes.

- Work with the CoSB DoIT & enFocus team to develop data sharing agreements with other institutions and create a performance management initiative around local assistance programs.

### Duration

- Initiate engagement on January 1, 2022
- End engagement on December 31, 2022

### Management

This position dually reports to CoSB's Civic Innovation Director and enFocus's Director of Projects. To ensure best practices in data management and sharing are achieved, communication across parties will be essential. As such, this position will have access to both CoSB and enFocus office space and tools. CoSB will provide the Local Assistance Lead with access to tools and data as relevant to CoSB assistance programs. If data sharing agreements are reached between CoSB and external partners' assistance programs, the local assistance lead will have access to enFocus tools and data management storage sites to properly and safely house information.

### Funding and Timeline

The salary for this position is \$66,500 annually, subject to salary increase in subsequent years . The individual will also have access to:

- Health insurance reimbursement through enFocus's QSEHRA plan. This plan provides annual reimbursement up to:

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- \$2,000 for individuals
- \$4,000 for families
- enFocus, orientation, professional development curriculum and events, and mentoring opportunities

The individual will utilize enFocus systems to request reimbursement. If/when a request is made, the cost will be passed on to the CoSB of South Bend in the following month's invoice. Management and administration of payment incurs a 7% administration fee. The minimum monthly rate would be \$5,929.58. The maximum monthly rate would be \$6,286.25

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## Exhibit E: Project Description

### Technology Resource Center (TRC) Management

**Project Objective:** *To assist the City of South Bend (CoSB) in providing essential project management and new program design for the professional development of CoSB residents.*

#### Preliminary Project Scope

##### Management and Programming of the TRC

*Phase Objective:*

- Engage key stakeholders in management of the TRC workspace, for both external

(public) and internal (CoSB) use under the direction of the Department of Innovation & Technology's Chief Innovation Officer Denise Riedl and Director of Civic Innovation Brian Donoghue.

*Key Activities:*

- Continue necessary management responsibilities to maintain the operability of the TRC.
  - Manage the CoSB TRC calendar for external and internal use, including scheduling TRC use, preparing for use, and training users on how to use the space.
  - Act as point-of-contact with the property manager and the CoSB of South Bend for regular and emergency maintenance issues.
  - Develop necessary protocols and processes for users to utilize the space effectively and safely throughout the COVID-19 pandemic.
- Conduct a current state analysis of the current management and operations of the TRC:
  - Facilitate informational interviews and workshops with CoSB leadership and related divisions' staff on current operations and challenges.
  - Identify challenges, process breakdowns, and barriers in achieving objectives toward utilizing the space effectively.
  - Determine and prioritize areas for improvement to current TRC operations and management to align the TRC toward public and private needs.

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## Exhibit F: Project Description

### Project Management within Operations

**Project Objective:** *To assist the City of South Bend (CoSB) Department of Innovation and Technology (DoIT) in building capacity of a Project Management office and actively manage ongoing projects.*

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### Preliminary Project Scope

#### Activity 1: Assist in CityWorks scopings and implementations

*Phase Objective:*

- Define and scope departmental processes to plan the implementations of CityWorks, as well as prioritize and lead implementations of processes across departments *Key Activities:*



- Lead investigative workshops with department stakeholders to learn about existing procedures for processes considered for CityWorks
  - Processes are predefined and prioritized by the Manager of Operations
  - Each process investigation should estimate six (6) weeks
- Assist in prioritization of processes to inform a complete timeline of CityWorks implementations

*Potential Activities:*

- Manage the implementations of CityWorks for some identified processes using the scope defined in the investigation stage:
  - Identify key milestones and estimated timeline
  - Engage with CityWorks and developers from Applications to define roles of stakeholders in each department
  - Update current processes to reflect new CityWorks capabilities
  - Train stakeholders on use of CityWorks and related new processes

**Activity 2: Develop and implement action item tracking system**

*Phase Objective:*

- Identify and build an internal action item tracking system to be used by the Manager of Operations and the project management team

*Key Activities:*

- Identify potential action item tracking systems considering at least the following criteria:
  - Free use or access through existing CoSB licenses
  - Ability to assign action item to individual users
  - Ability to configure email notifications for action item updates, upcoming deadlines, etc.
  - Suited for short- and long-term action items, grouped by topic or project
- Under direction of the Manager of Operations, decide action item tracking system
- Configure and launch system to suit to the needs of the project management team
- Evaluate success of implementation with regular check-ins with the Manager of Operations and project management team to determine effectiveness
  - If necessary, reiterate phase using different action item tracking software

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**Activity 3: Investigate software and system accountability between departments**

*Phase Objective:*

- Investigate software and systems used by CoSB departments and develop accountability matrices between the departments and DoIT to clarify administrative responsibilities

*Key Activities:*

- Inventory softwares and systems used by each CoSB department that have shared ownership or management with DoIT, exemplified by but not limited to:
  - CoSB website(s)
  - CRM softwares
  - CityWorks processes
  - SharePoint system management
- Prioritize softwares and systems to address based on criteria set by the Manager of

- Operations, such as but not limited to:
  - Current clarity of responsibilities
  - Frequency of use or access by departments
  - Stage of software or system implementation
- Develop accountability matrix documentation to be shared between departments
  - Create RACI matrix roles and responsibilities specific to each software or system
  - Create MOU agreement to be signed by department heads
- Lead communications between DoIT and departments to complete and implement responsibility matrix
  - Assign responsibilities with current state knowledge based on inventory
  - Evaluate accuracy of RACI matrix with department stakeholders and determine gaps in current activities
  - Develop plan of action to lead both departments to complete responsibilities outlined
- Implement accountability matrix documentation into future DoIT project scope

## Timeline

Darker colors denote higher or prioritized effort towards project activities, while lighter colors denote lessened efforts.

Phase Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul CityWorks scoping

CityWorks implementation  
(potential activity)

Develop action item  
tracking system

Investigate accountability

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