

**CONTRACT NO. 20250363**  
**AGREEMENT BETWEEN CHARLOTTE COUNTY**  
**and**  
**AGREEYA SOLUTIONS, INC.**  
**for**  
**CONSULTANT TO REDESIGN INTRANET**

**THIS AGREEMENT** (hereinafter the "Agreement"), is made and entered into by and between CHARLOTTE COUNTY, a political subdivision of the State of Florida, 18500 Murdock Circle, Port Charlotte, Florida 33948-1094, hereinafter the "County," and AGREEYA SOLUTIONS, INC., 605 Coolidge Drive, Suite #200, Folsom, California 95630, hereinafter the "Consultant."

**WITNESSETH**

**WHEREAS**, the County has determined that it is necessary to retain a Consultant to provide professional Information Technology ("IT") services supporting the evaluation, implementation and utilization of data integration techniques, business intelligence and analytical reporting platforms; and analysis, strategic and operational planning for the County's Analytics Business Intelligence platforms (the "Projects"); and

**WHEREAS**, the County has determined that it would be in the best interest of the County to enter into a contract with Consultant for the rendering of those redesign services.

**NOW, THEREFORE**, the County and the Consultant, in consideration of the mutual covenants contained herein, agree as follows:

**ARTICLE 1.**  
**CONSULTANT'S SCOPE OF SERVICES**

1.1. Consultant agrees to perform all the services and provide all the materials associated with the Project as described in **Exhibit A – Scope of Services**.

1.2. Consultant agrees to provide its services and all materials for the Project on an ongoing basis and/or within the times allowed for performance set forth in **Exhibit A – Scope of Services**. The Consultant shall make no claims for additional compensation or damages arising from suspensions, delays, or hindrances during performance of this Agreement. Such suspensions, delays, or hindrances may be addressed only through an extension of time as the County may determine. Any such extension shall not operate as a waiver of any other rights of the County.

1.3. In the event the County desires Consultant to perform additional services not specifically contained in **Exhibit A – Scope of Services**, the parties shall enter into a written amendment to this Agreement providing for such additional services and corresponding compensation.

**ARTICLE 2.**  
**COMPENSATION AND PAYMENT FOR CONSULTANT'S SERVICES**

2.1. The County shall pay the Consultant a fixed fee of Forty-Five Thousand Three Hundred Fifty Dollars (\$45,350.00) for completion of the Project. Compensation shall be earned and invoiced on the basis of the milestones set forth in **Exhibit B – Compensation and Fees**

2.2. Consultant shall submit all billings for payment of services rendered on a monthly basis to the County Purchasing Division for processing. Billings shall be detailed as to the nature of the tasks and services performed, the hours expended and shall refer to the specific tasks listed in the Scope of Services that were actually performed by Consultant. Billings shall include a summary of any amounts previously billed and any credits for amounts previously paid.

2.3. Consultant acknowledges that each billing must be reviewed and approved by the County Senior Division Manager for IT, or his/her designee. Should the Senior Division Manager for IT, or his/her designee, determine that the billing is not commensurate with services performed, work accomplished or hours expended, Consultant shall adjust billing accordingly. However, Consultant shall be entitled to payment of any portion of a billing not in dispute.

2.4. County shall pay Consultant's monthly billings in accordance with Sections 218.70 through 218.80 Florida Statutes, the Local Government Prompt Payment Act.

**ARTICLE 3.**  
**CONSULTANT'S RESPONSIBILITIES**

3.1. Consultant shall perform or furnish consulting and related services to a level of technical skill, ability, and diligence customarily provided by an experienced professional in his or her field of expertise when rendering the same services, and in accordance with sound principles and practices generally acknowledged by professionals in his or her field of expertise, as represented to the County, both orally and in writing, to be possessed by Consultant, all in accordance with the standards contained elsewhere in this Agreement and in accordance with generally accepted standards of professional consulting practice and with the laws, statutes, ordinances, codes, rules and regulations governing Consultant's profession. The same standards of care shall be required of any subconsultant or subcontractor engaged by Consultant.

3.2. In the performance of this Agreement, except as may be set forth in **Exhibit A**, Consultant shall provide all physical assets needed for the performance of the Projects services, including, but not limited to, computers, modems, printers, telefaxes, telephones, office supplies, and internet and telephone access. To the extent necessary to perform the Projects services, the County may require the Contractor to use County-owned equipment.

3.3. Consultant shall, without additional compensation, correct and revise any errors, omissions, or other deficiencies in its work product, services, or materials arising from the negligent act, error or omission of Consultant or any subconsultant or subcontractor engaged by Consultant for the duration as may be agreed upon under the warranty obligations as applicable per the Statement of Work provided by Consultant, incorporated

and attached hereto in **Exhibit A – Statement of Work (SOW)**. The foregoing shall be construed as an independent duty to correct rather than a waiver of County's rights under any applicable statute of limitations. County's review of, approval of, acceptance of, or payment for any of Consultant's work product, services, or materials shall not be construed to operate as a waiver of any of County's rights under this Agreement, or cause of action County may have arising out of the performance of this Agreement.

3.4. Consultant shall provide, implement and maintain data security systems satisfactory to the County so that County's computers, databases and website are protected from the risk of accidental or malicious alteration or destruction, and from unauthorized access or disclosure.

#### **ARTICLE 4. OWNERSHIP AND USE OF DOCUMENTS**

4.1. All documents, data, studies, surveys, analyses, sketches, tracings, specifications, plans, designs, design calculations, details, computations, drawings, maps, models, photographs, reports, and other materials produced by Consultant under this Agreement shall be and remain the property of the County. Consultant shall deliver such materials to the County without restriction, cost, or limitation as to use, regardless of format (paper or electronic). Any subsequent use by the County for purposes other than the specific project for which the items were created shall be at the County's sole risk..

4.2. Consultant shall ensure that any software, computer systems, and databases used to provide the documents required under this Agreement are compatible with existing County software and systems.

#### **ARTICLE 5 COUNTY'S RESPONSIBILITIES**

5.1. County shall perform the responsibilities contained in this Article 5 in a timely manner so as not to delay the services of Consultant.

5.2. County shall furnish to Consultant, upon request of Consultant and at County's expense, all existing studies, reports, analytics and other available data pertinent to the Projects services, which are within the County's possession or control.

5.3. County shall provide electronic access to Consultant to all County platforms and systems necessary for the rendering of the Projects services. County shall provide County equipment to the extent that the County deems necessary for the rendering of the Projects services, which equipment is and remains the property of the County. County shall further provide reasonable access and entry to all public property required by Consultant to perform the services described in this Agreement. All such access and entry shall be provided at County's expense. County shall also use reasonable efforts to obtain permission for reasonable access and entry to any private property required by Consultant to perform the services described in this Agreement.

**ARTICLE 6.**  
**EFFECTIVE DATE / TERM / TERMINATION**

6.1. The Effective Date of this Agreement is the date of Board approval or execution.

6.2. The term of this Agreement shall begin on the Effective Date and continue for a period of one (1) year. This Agreement may be renewed for up to two (2) one (1) year periods under the same terms and conditions upon mutual written agreement of the parties.

6.3. Consultant's services shall be deemed complete when the Consultant provides all products and services required under **Exhibit A – Scope of Services** and this Agreement, or any amendment hereto, and the County accepts such services and products as satisfactory, unless otherwise terminated under this Article.

6.4. The Consultant shall promptly notify the County whenever a delay is anticipated or experienced. The County may extend the Project schedule for valid, documented delays. The County shall be the sole determiner of the validity of such delays.

6.5. Either party may terminate this Agreement, for cause or convenience, upon thirty (30) calendar days' written notice. In such event, the Consultant shall cease work and deliver to the County all documents (including reports, designs, specifications, and all other data in whatever form) prepared or obtained by the Consultant in connection with its services, along with any County-owned equipment previously provided. Upon receipt of the documents and equipment, the County shall pay the Consultant fees for all completed milestones in accordance with **Exhibit A – Scope of Services**.

6.6. If the Consultant abandons performance under this Agreement, the County may terminate this Agreement upon three (3) calendar days' written notice stating the evidence of abandonment. Payment for services performed prior to abandonment shall be made in accordance with Article 2.

**ARTICLE 7.**  
**NOTICES**

7.1. Any notice required or permitted to be sent hereunder shall be in writing, sent certified mail, and return receipt requested to the parties at the addresses listed below:

Consultant: AgreeYa Solutions, Inc.

County: Purchasing Division

Name: Ajay Kaul, Managing Partner

Name: Kimberly A. Corbett  
Sr. Division Mgr.

Address: 605 Coolidge Dr.  
Suite 200  
Folsom, CA 95630

Address: 18500 Murdock Circle, Ste. 344  
Port Charlotte, FL 33948

7.2. Consultant shall immediately notify County of any changes in address.

**ARTICLE 8.**  
**ASSIGNMENT**

8.1. This Agreement, or any interest herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances by Consultant without the prior written consent of County. Further, no portion of this Agreement may be performed by subcontractors or subconsultants without written notice to and approval of such action by County.

**ARTICLE 9.**  
**INSURANCE**

9.1. Consultant will secure and maintain, for the duration of this Agreement, commercial general liability insurance in the amount of \$1Million, with an endorsement for Cyber Liability coverage in an amount acceptable to the County. On all policies, the Certificate Holder shall read Charlotte County Board of County Commissioners, and the Certificate Holder shall be named as an additional insured. The Consultant shall submit to County evidence of coverage within twenty (20) days of the Effective Date of this Agreement.

9.2 In the event that any required policy of insurance does not comply with these requirements, is not procured, or is cancelled without replacement, the County may terminate this Agreement or, at its option, obtain insurance if it deems necessary. Any premiums paid by the County shall be promptly reimbursed by the Consultant, or the County may deduct such amounts from payments due under this Agreement.

**ARTICLE 10.**  
**EXTENT OF AGREEMENT / SEVERABILITY / MODIFICATION**

10.1. This Agreement constitutes the entire and integrated agreement between the County and the Consultant and supersedes all prior negotiations, representations, or agreements, whether written or oral.

10.2. If any provision of this Agreement is held invalid or unenforceable, the remaining provisions shall remain valid and binding. A waiver by either party of any breach of any provision, term, condition, or covenant shall not be construed as a waiver of any subsequent breach.

10.3. No modification, amendment, or alteration of the terms or conditions of this Agreement shall be effective unless set forth in a written instrument executed by both parties.

10.4. This Agreement is nonexclusive. The County may enter into contracts with other consultants for the provision of services, and the Consultant may provide services to other clients.

**ARTICLE 11.**  
**GOVERNING LAW / VENUE**

11.1. This Agreement shall be governed and construed in accordance with Florida law. In the event any litigation arises between the parties in connection with this Agreement, venue for such litigation, if in state court, shall be the Circuit Court in and for

Charlotte County, Florida and, if in federal court, shall be the U.S. District Court for the Middle District of Florida, Ft. Myers Division.

**ARTICLE 12.**  
**INDEPENDENT CONTRACTOR STATUS**

12.1. Consultant is an independent contractor and is not an employee, servant, agent, partner or joint venturer of the County. Neither the County nor any of its employees shall have any control over the conduct of Consultant or any of Consultant's employees, except as herein set forth, and Consultant expressly warrants not to represent at any time or in any manner that Consultant or any of Consultant's agents, servants or employees are in any manner agents, servants or employees of the County. It is understood and agreed that Consultant is and shall at all times remain as to the County, a wholly independent contractor and that Consultant's obligations to the County are solely as prescribed by this Agreement.

12.2. Consultant understands and agrees that as an independent contractor, the Consultant has no right to and will not be qualified to participate in, or to receive, any employment benefits from the County. The County shall have no liability or responsibility for the withholding, collection or payment of any employment taxes, employment insurance premiums, pension contributions or any other perquisite of employment. The Consultant agrees to indemnify the County from any and all claims in respect to the County's failure to withhold and/or remit any taxes, employment insurance or pension contributions.

**ARTICLE 13.**  
**AUDIT AND RECORDS REQUIREMENTS**

13.1. Consultant shall maintain books, records, documents, and other evidence directly pertaining to or connected with the services under this Agreement which shall be available and accessible at Consultant's local offices for the purpose of inspection, audit, and copying during normal business hours by the County, or any of its authorized representatives. Such records shall be retained for a minimum of five (5) years after completion of the services. Charlotte County has an obligation under Florida Statutes to preserve all records related to this contract. Accordingly, prior to the destruction the Consultant must provide notice via postal mail or via email at [Records@charlottecountyfl.gov](mailto:Records@charlottecountyfl.gov) notify the County 2 weeks prior to the destruction of any records; and Consultant must also provide a copy of all records Consultant intends to destroy to the County's Records Management Office prior to destruction. Consultant shall require all subcontractors to comply with the provisions of this paragraph by insertion of the requirements hereof in a written contract agreement between Consultant and the subcontractor.

13.2. If the records are unavailable locally, it shall be the Consultant's responsibility to ensure that all required records are provided at the Consultant's expense including payment of travel and maintenance costs incurred by the County's authorized representatives or designees in accessing records maintained out of the County. The direct costs of copying records, excluding any overhead cost, shall be at the County's expense.

13.3. Pursuant to Section 119.0701 of the Florida Statutes, contractors acting on behalf of the County must comply with the public records laws, specifically: a) keep and maintain public records required by the County to perform the contracted services; b) upon request from the County's custodian of public records, provide the County 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 of the Florida Statutes or as otherwise provided by law; c) ensure that public records that are exempt or confidential 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; and d) upon completion of the contract, keep and maintain all public records required by the County to perform the service, and meet all applicable requirements for retaining public records.

**IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO RETAIN AND PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT (941) 743-1441, E-MAIL TO RECORDS@CHARLOTTECOUNTYFL.GOV, 18500 MURDOCK CIRCLE, BLDG. B, Suite 109, PORT CHARLOTTE, FLORIDA 33948.**

**ARTICLE 14.**  
**INDEMNIFICATION**

14.1. Consultant shall indemnify and hold harmless the County, its Commissioners, officers, employees, agents and volunteers from and against any and all liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Consultant and other persons employed or utilized by the Consultant in the performance of this Agreement.

**ARTICLE 15.**  
**SCRUTINIZED VENDORS**

15.1. Pursuant to Section 287.135(3)(b) of the Florida Statutes, Charlotte County may, at its sole option, terminate this Agreement if the Consultant is found to have been placed on the *Scrutinized Companies that Boycott Israel List*, or is engaged in a boycott of Israel.

**ARTICLE 16.**  
**UNAUTHORIZED ALIEN WORKERS**

16.1. Charlotte County will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a [Section 274A of the Immigration and Nationality Act (“INA”)]. The County shall consider employment by any contractor of unauthorized aliens a violation of Section 274A of the INA. Such violation by the Consultant of the employment provisions contained in Section 274A of the INA shall be grounds for termination of this Agreement by the County.

16.2. In addition, pursuant to Section 448.095 of the Florida Statutes, all persons or firms entering into contracts with Charlotte County are required to register with, and use, the E-Verify system of the U.S. Department of Homeland Security to electronically verify the employment eligibility of all newly hired employees. The County may terminate this Agreement for failure on the part of the Consultant to use E-Verify. Contract termination for failure to use E-Verify is not considered a breach of contract pursuant to s. 448.095(5)(c)3, *Fla. Stat.*

**ARTICLE 17.**  
**HUMAN TRAFFICKING**

17.1. Pursuant to Section 787.06 of the Florida Statutes, by signing this Agreement, Consultant agrees and attests, under penalty of perjury, that Consultant does not use coercion for labor or services as defined in Section 787.06 of the Florida Statutes.

[Remainder of page intentionally left blank]

**IN WITNESS WHEREOF**, the parties hereto have entered into this Agreement as of the date and year below written.

WITNESS:

Signed By: Sharmeen S. Yunus  
Print Name: SHARMEEN S. YUNUS  
Date: 9/25/2025

**AGREEYA SOLUTIONS, INC.**

By: [Signature]  
Date: 9/25/2025

**BOARD OF COUNTY COMMISSIONERS  
OF CHARLOTTE COUNTY, FLORIDA**

ATTEST:

Roger D. Eaton, Clerk of the Circuit  
Court and Ex-Officio Clerk to the  
Board of County Commissioners

By: [Signature]  
Joseph M. Tiseo, Chairman  
Date: September 25, 2025



By: Kimberly Walsh  
Deputy Clerk

APPROVED AS TO FORM  
AND LEGAL SUFFICIENCY:

By: Janette S. Knowlton  
Janette S. Knowlton, County Attorney  
LR25-0874 [Signature]

Exhibit List:

- Exhibit A -- Scope of Services.
- Exhibit B -- Compensation and Fees



# Exhibit A

[www.agreeya.com](http://www.agreeya.com)

## Charlotte County Purchasing Division

### Consultant to Redesign Intranet

### Statement of Work

Dated: September 12, 2025  
Version 1.0



Infrastructure (Azure)  
Data and AI (Azure)  
Digital & App Innovation (Azure)  
Modern Work



Submitted to



Submitted by



## Introduction

This Statement of Work ("SOW") is executed by and between AgreeYa Solutions ("AgreeYa") and Charlotte County Purchasing Division ("County" or "Customer") for providing consultation on Intranet Redesign. Exhibit A and Exhibit B under this SOW will be subject to and will be governed by the "CONTRACT NO. 20250363" ("Agreement").

## Exhibit A – Scope of Services

### 1. Scope of Services

The scope of this engagement is to redesign its Connect@Work intranet to serve as a modern, responsive digital workplace, one that functions both as a communications hub and as a centralized portal for employee services. The County's goals include enhanced usability, accessibility, and engagement across a diverse workforce that includes on-site, remote, hybrid, and field-based employees.

Under this Statement of Work (SOW), AgreeYa will provide the following:

#### 1. Stakeholder Engagement

- Facilitate inclusive, well-structured focus groups and interviews with County leadership, departmental staff, and front-line employees.
- Ensure proportional representation from various work settings—field, remote, hybrid, and on-premises, consistent with the County's organizational diversity.

#### 2. Requirements Gathering

- Identify and document existing pain points and aspirational goals across all departments.
- Gather both functional and non-functional requirements, including usability, integration needs, scalability, and content governance.
- Conduct a comprehensive content audit of the existing intranet to evaluate relevance, accuracy, and redundancy.

#### 3. Design and Planning

- Create detailed user personas and journey maps that reflect the needs and behaviors of key user groups.
- Develop an intuitive, scalable information architecture with clear navigation paths.
- Deliver wireframes and design mockups that are visually aligned with the County's brand and accessibility requirements.

#### 4. Implementation Planning

- Recommend delivery models (internal, external, or hybrid) with pros and cons tailored to Charlotte County's IT capabilities and staffing.
- Develop a practical change management and communication strategy to drive user adoption.
- Define post-launch success metrics and KPIs aligned to engagement, usage, and service efficiency.

#### 5. Compliance and Accessibility

- Ensure all design and technical recommendations meet ADA and WCAG 2.1 AA standards.
- Incorporate security, performance, and maintainability requirements as foundational elements of the future platform.

## 6. Expected Deliverables

- Comprehensive requirements documentation and user research findings.
- Scalable information architecture and branded visual design concepts.
- A detailed project roadmap, including implementation strategy and change management plan.

## 2. Approach and Methodology

Our phase-wise approach clearly defines responsibilities between AgreeYa and County to ensure a collaborative, transparent, and structured delivery process. Each phase concludes with concrete deliverables to support decision-making and align with the County’s long-term intranet goals.

### PHASE 1 – PROJECT KICK OFF AND REQUIREMENT

Project Kickoff and Requirement Planning	
AgreeYa’s Responsibilities	County’s Responsibilities
<ul style="list-style-type: none"> <li>• Project Initiation and Project Kickoff meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• Take part in initiating the project</li> <li>• Attend the Kick-off meeting</li> </ul>
<ul style="list-style-type: none"> <li>• Request access to Environment, share all pre-requisites.</li> </ul>	<ul style="list-style-type: none"> <li>• Review the Pre-Requisites &amp; Provide all necessary access</li> </ul>
<ul style="list-style-type: none"> <li>• Identify project plan activities, dependencies, and timeline</li> </ul>	<ul style="list-style-type: none"> <li>• Designate core team members and executive stakeholders</li> </ul>
<ul style="list-style-type: none"> <li>• Share survey tools to assess current collaboration and communication gaps</li> </ul>	<ul style="list-style-type: none"> <li>• Provide access to systems and documentation as needed</li> </ul>
<ul style="list-style-type: none"> <li>• Analyse existing design and UX issues</li> </ul>	<ul style="list-style-type: none"> <li>• Share existing pain points, priorities, and known user challenges</li> </ul>
<ul style="list-style-type: none"> <li>• Provide project management (throughout the project duration).</li> </ul>	<ul style="list-style-type: none"> <li>• Attend weekly project meetings</li> </ul>
<ul style="list-style-type: none"> <li>• Project Plan Creation.</li> </ul>	<ul style="list-style-type: none"> <li>• Review the Project Plan and provide signoff</li> </ul>
<b>DELIVERABLES:</b> <ul style="list-style-type: none"> <li>• Project Plan</li> </ul>	

**PHASE 2 – DISCOVERY & REQUIREMENTS GATHERING**

Discovery & Requirement Gathering	
AgreeYa's Responsibilities	County's Responsibilities
<ul style="list-style-type: none"> <li>• Conduct Requirement Gathering &amp; Stakeholder Sessions (<b>*timeboxed to up to 20 hours*</b>)               <ul style="list-style-type: none"> <li>○ Create and analyse surveys</li> <li>○ Review communication/collaboration challenges</li> <li>○ Identify business needs, functional &amp; technical requirements</li> <li>○ Conduct Persona Creation &amp; User Journey Mapping</li> </ul> </li> <li>• Facilitate discovery sessions using early UI sketches and design mock-ups</li> </ul>	<ul style="list-style-type: none"> <li>• Actively participate in all requirement sessions</li> <li>• Share relevant inputs and validate requirements</li> </ul>
<p><b>Stakeholder's Session(s)</b></p> <ul style="list-style-type: none"> <li>• Field Worker Sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Four onsite sessions (1 hour each) with around 20 field workers, conducted over two consecutive days.</li> <li>• No travel cost assumed as County will manage group logistics.</li> </ul> <p>Duration: 4 hours total            Target: Field Workers (~80 total)            Number of Sessions: 4 session X 20 Field workers</p>
<p><b>Stakeholder's Session(s)</b></p> <ul style="list-style-type: none"> <li>• Stakeholder &amp; Departmental Meetings including in-office staffs</li> </ul>	<ul style="list-style-type: none"> <li>• Discussions to gather requirements, conducted mostly remotely.</li> <li>• Some in-person interviews may hold during the 2-day onsite visit for better engagement</li> </ul> <p>Duration: Up to 20 hours            Target: Stakeholders &amp; Departmental Leads</p>
<ul style="list-style-type: none"> <li>• Perform Competitive Analysis</li> <li>• Brainstorming &amp; Conceptualization</li> <li>• Develop Front Landing Page &amp; Division Layouts</li> <li>• Define Information Architecture (Navigation)</li> <li>• Identify Governance Requirements</li> <li>• Perform Content Audit and Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Provide feedback during discussions</li> <li>• Share access to current site structure and content as needed</li> </ul>

<ul style="list-style-type: none"> <li>• Create Business Requirements Document (BRD) and walk through for review and signoff.</li> </ul>	<ul style="list-style-type: none"> <li>• Review BRD and provide timely feedback and signoff</li> </ul>
<p><b><u>DELIVERABLES:</u></b></p> <ul style="list-style-type: none"> <li>• Assessment Report</li> <li>• Business Requirements Document (BRD)</li> </ul>	

***\*Time-boxed to 20 hours\*:*** The initial 20-hour timebox is meant to keep things efficient and minimize disruption. We typically combine stakeholder interviews, surveys, and group sessions to make the most of that time. If deeper session is needed, we're flexible and happy to adjust in coordination with your team leads and can be increased to up to 32 hours within the provided cost. The goal is a structured, inclusive, and thoughtful discovery process—not a rushed one.

**PHASE 3 – DESIGN AND PROTOTYPING**

Design and Prototyping	
AgreeYa's Responsibilities	County's Responsibilities
<ul style="list-style-type: none"> <li>• Develop up to 4 wireframes and present for feedback</li> <li>• Create low fidelity homepage and department page visual designs (2 concepts)</li> <li>• Build responsive designs for mobile optimization</li> <li>• Develop design prototype in Figma for navigation and flow testing</li> <li>• 1 design iteration based on input, finalize UI and navigation structure</li> </ul>	<ul style="list-style-type: none"> <li>• Review and provide feedback on wireframes</li> <li>• Validate design alignment with branding and expectations</li> <li>• Provide accessibility and mobile behaviour preferences</li> <li>• Test design prototype and share feedback</li> <li>• Participate in design review sessions</li> </ul>
<p><b><u>DELIVERABLES:</u></b></p> <ul style="list-style-type: none"> <li>• Low Fidelity Wireframes (Home &amp; Department Pages)</li> <li>• High Fidelity Visual Design Concepts and Style Guide</li> </ul>	

**PHASE-4 IMPLEMENTATION, RECOMMENDATION & ROADMAP**

Phase 4 Implementation, Recommendation & Roadmap	
AgreeYa's Responsibilities	County's Responsibilities
<b>Implementation Plan and Roadmap</b> <ul style="list-style-type: none"> <li>• Create Plan and Roadmap for Implementation as per the Requirements.</li> <li>• OCM and Training Plan</li> <li>• Review Plan and Roadmap, signoff</li> <li>• SOW with cost and timeline for actual Implementation as per approved Roadmap</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Review and provide signoff.</li> </ul>
<b>DELIVERABLES:</b> <ul style="list-style-type: none"> <li>• Roadmap</li> <li>• OCM Plan</li> <li>• SOW with Cost and High-Level Timeline</li> </ul>	

**PHASE 5 – FINAL DELEVERABLES AND PRESENTATION**

Final Deliverables and Presentation	
AgreeYa's Responsibilities	County's Responsibilities
<b>Closure</b> <ul style="list-style-type: none"> <li>• Submit Project Closure Report ensuring all artifacts are provided to the County.</li> <li>• Present final design, roadmap, and outcomes to stakeholders</li> <li>• Conduct knowledge transfer and handoff to County team</li> </ul>	<ul style="list-style-type: none"> <li>• Attend project closeout meeting</li> <li>• Provide final feedback and confirm acceptance</li> <li>• Review and provide final signoff</li> </ul>
<b>DELIVERABLES:</b> <ul style="list-style-type: none"> <li>• Project Closure Report</li> <li>• Final Presentation and Knowledge Transfer</li> </ul>	

### 3. Project Assumptions

The following assumptions have been made in developing this proposal:

- Under this SOW, the onsite travel is limited to the following scope activity defined in Phase 2 of section 3 Approach and Methodology in this SOW.
  - Conduct four (4) onsite sessions, each lasting one (1) hour, with approximately 20 field workers per session. These sessions will be held over two consecutive days, covering about

- 80 field workers in total (20x4). No additional travel costs are assumed, as the County will manage group logistics.
  - Stakeholder and departmental meetings (up to 20 hours) will be conducted in the hybrid model preferably remote. However, during our planned 2-day onsite visit, we will also hold select in-person interviews to ensure better engagement.
- 2. This engagement includes **strategy, discovery, UX/UI design, and implementation planning** — no development, migration, or backend configuration activities are in scope.
- 3. The County will assign a **Single Point of Contact (SPOC)** to coordinate project communications, consolidate feedback, and sign off on deliverables in a timely manner.
- 4. Stakeholder availability and timely participation will be coordinated by the County to avoid delays.
- 5. All **reviews and approvals** (e.g., BRD, IA, design mockups) will be provided within **2–3 business days** unless otherwise discussed.
- 6. **UX/UI scope includes wireframes, user flows, and high-fidelity mockups**; it does not include HTML, CSS, or frontend development.
- 7. **Persona creation** will be based on stakeholder interviews and County-provided data; no independent user surveys or ethnographic studies will be conducted.
- 8. **Information Architecture** will go through **one round of review and approval**.
- 9. Each UI screen will include up to **one design iteration**, unless otherwise agreed.
- 10. Visual designs will align with **existing County branding**; any new branding effort is out of scope unless explicitly requested.
- 11. All visual design and UI assets will be delivered using **Figma**, unless an alternative tool is mutually agreed upon.
- 12. Client-provided content (e.g., logos, icons, text) is considered final unless feedback is shared during the design phase.
- 13. A style guide will be delivered in PDF or Figma format, covering typography, color palette, icons, components, and spacing—**not a coded design system**.
- 14. One homepage and one department template will be designed in high fidelity, with up to **two rounds of feedback** each.

## 4. Timelines

The total estimated timeline for the proposed services outlined in our proposal response is **Ten (10) weeks**. This plan aligns with our proposed project plan to successfully complete all project deliverables within the defined schedule.

Project Phases	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	
Project Kickoff and Requirement											
Discovery and Requirements Gathering											
Design and Prototyping											
Recommendation and Roadmap											
Final Deliverables and Presentation											

## 5. Change Order Management

AgreeYa uses a structured Change Control process to manage any revisions to finalized requirements. This ensures that scope, timeline, and quality are preserved while maintaining transparency with all stakeholders.

If changes are requested after requirements are signed off, we follow these steps:

1. The Project Manager logs the change request and evaluates whether it falls within the agreed scope.
2. The request is reviewed by a joint change authority (e.g., project steering committee) for approval.
3. Upon approval, the change is incorporated into the plan, re-estimated if needed, and scheduled accordingly.
4. All changes are tracked through a formal log, and a post-implementation review is conducted if the change is significant.

This process will be defined and agreed upon during the project kickoff to ensure County stakeholders have clear visibility into how scope and requirement changes are managed throughout the project.

## 6. Location of Work

AgreeYa will provide these services from Global Delivery Center in Folsom, CA; along with any other locations deemed appropriate by AgreeYa.

**Charlotte County Purchasing Department  
(Customer)**

**AgreeYa Solutions, Inc.**

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Authorized Signature

  
\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name: Ajay Kaul

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title: Managing Partner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date: 9/25/2025

## Exhibit B – Compensation and Fees

### Fees

The total project cost of **\$45,350.00** (Dollars Forty-Five Thousand Three Fifty Only) reflects a carefully considered and well-structured pricing model aligned with the scope and complexity of work outlined in the RFP.

### Invoicing and Payment Terms

- AgreeYa will invoice the fee as per the following payment milestones.

#	Milestone Deliverable	Amount
M1	Upon Delivery of Project Plan	\$13,605.00
M2	Upon Delivery of low fidelity Wireframes	\$20,408.00
M3	Upon Final Presentation	\$11,337.00

- County will process the invoice within NET thirty (30) days upon receipt of the invoice.

**Charlotte County Purchasing Department**  
**(Customer)**

**AgreeYa Solutions, Inc.**

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Authorized Signature

  
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Authorized Signature

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Name

\_\_\_\_\_  
Name: Ajay Kaul

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Title

\_\_\_\_\_  
Title: Managing Partner

\_\_\_\_\_  
Date

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Date: 9/25/2025

[AgreeYa Solutions, Inc.](http://www.agreeya.com)

Page 10 of 10