

**Preferred Client Service Agreement
Mount Diablo Unified School District : Streamfine Consulting**

Preferred Client Agreement

A monthly fee grants access to on-call Application Support and troubleshooting (response within 6 to 8 hours, during normal business hours), and a 10% rate discount which is applied to all work performed for the client.

Up to an hour of troubleshooting can usually be done immediately, with follow up scheduled as needed. No hours are included in the pre-billed monthly fee. All hours worked are billed at the end of the month.

Onsite Visits

Under this agreement, onsite time is considered vital in order to maintain a high level of service, as such, scheduling an onsite trip once every 30 to 60 days is required.

The Preferred Client Agreement Base Fee: \$1750

(based on ~3500 employees, and an expected 10-15 hours of support per month)

Follow up support and Development hours will be scheduled into the calendar as availability allows. The standard Normal Hourly Rates are used, but are discounted 10% for preferred clients, as shown below:

Preferred Rates

(Shown with 10% discount applied)

Remote Work:	\$145 / hr	(4 hour minimum)
After Hours/Urgent:	\$180 / hr	
On-site Work:	\$240 / hr	(all expenses included, 30 hour minimum)

For Reference Non-Preferred hourly rates are as follows:

Remote Work:	\$160 / hr	(4 hour minimum)
After Hours/Urgent:	\$200 / hr	
On-site Work:	\$265 / hr	(all expenses included, 30 hour minimum)

Term

The Preferred Client Service Agreements are for 12 month terms.
Renewable on an annual basis with 3% increase applied.

Early termination of the agreement, by the client, requires payment of 50% of the remaining monthly fee's, and onsite visits (minimum 6 per year at 30hrs).

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Base Monthly Fee: \$1,750
(fee will be billed on the 15th of each preceding month)

Requirements:

- 6 to 12 onsite visits, to be scheduled in advance.
- Monthly payment of invoice for hours worked.
- Payment of 50% remaining fees and onsite visits upon early termination of agreement by client. (~ \$2675 per remaining month)

Agreement Period: July 1, 2023 – June 30, 2024

Agreed and Signed

Mount Diablo Unified School District

Print Title

Sign Date

Streamfine Consulting

Tony Chapman Owner

Print Title

 5/31/2023

Sign Date

**System Enhancement Proposal
Mount Diablo Unified School District : Streamfine Consulting**

Overview

During discussion and review of the BusinessPLUS system, several potential areas for customization have been identified which could benefit from a streamlining of current processes, by converting the processes from paper to electronic forms, from manual to electronic workflow based routing of approvals, and in some cases eliminate the need for manual entry of data.

Proposed Customizations

To begin this process two areas with high transaction volume have been selected for initial customization:

- Budget Transfer Requests (Finance) and
- Employee Verification Form (HR/PY)

Costs

The development, customization, and ongoing maintenance of the forms and processes are provided via a subscription model. A 5 year fixed agreement is initiated upon acceptance of the finished form and process, which upon expiration, converts to an annual agreement with a 3% increase.

- Budget Transfer Request \$ 2,500 / annual
- Employee Verification Form \$ 7,500 / annual

Future Customizations

Below are additional areas have been identified which could benefit from creating a custom electronic process.

- Leave/Time Off Requests \$ 2,500 / annual
- Travel Requests \$ 5,500 / annual
- Travel Reimbursement \$ 5,500 / annual
- Mileage Reimbursement \$ 7,500 / annual
- Split Time Reporting \$ 7,500 / annual
- Vendor Request Form \$ 2,500 / annual