

# Attachment B: CSA Scope of Work

## I. Objectives

The Client is acquiring Tolemi BuildingBlocks and Slate, along with associated services, to meet the requirements defined in the City of San Leandro's Rental Registry Program Software RFP. The Tolemi platform will enable the City to:

- Manage complex workflows relating to rental property registration and compliance;
- Seamlessly adapt the rules and configurations associated with workflows as policies and processes within the City change, without requiring additional costs;
- Prevent workarounds and require that users adhere to business processes established by the City to govern the workflows managed within the solution;
- Allow for City leadership to track the status of projects, properties, and workflows, as well as to identify those that are behind schedule or otherwise needing attention;
- Manage and communicate with landlords, property managers, and owners
- Automate the process of alerting Users, Landlords, and management of pending, open, upcoming, and/or late tasks;
- Enable users to generate and customize reports & dashboards, and to extract data on operations & key performance metrics; and
- Centralize data and automate ongoing data ingestion from across different City systems within the solution to inform the business logic applied to workflows and to reduce staff time spent on research & information gathering; and
- Enhance the capacity of the City to leverage data, mapping, and advanced analytics to inform land use decisions and policies.
- Implement a rental registration software including modules for Automated Compliance & Rent Stabilization, including but not limited to, the following workflows:
  - Stabilized Unit Registration
  - Changes in Rent
  - Changes in Tenancy
  - Landlord and Tenant Petitions
  - Automated Stabilization Compliance

## II. Software, Services, and Methodology

The platform capabilities can be segmented into the following categories:

### *Accepting New Registrations:*

- Provide a website for landlords to register single units or bulk register multiple units
- Optionally, the platform can provide the ability to accept registrations in person at City Hall over the phone by city staff

- Collecting the required data fields, documents, and identities related to each registration
- Follow the City-designed process for review and accepting registrations
- Follow the City-designed process for owners declaring that a unit is not a rental property
- Generate documents from templates such as acceptance letters, rejection letters, and payment receipts
- Facilitating and documenting email communication between city staff and users
- Collecting fees and remitting money back to the City

*Handling Exemptions:*

- Allowing landlords to file exemptions through a public portal
- Requesting renewals of exemptions if required
- Optionally, requiring owners to print and sign exemption paperwork

*Managing Existing Registrations:*

- Allow landlords to update information without additional fee collection
- Automatically generate event-based notifications such as a police incident at the landlord's property
- Automatically generate and email renewal reminders to landlords prior to expiration
- Provide a website for landlords to renew their registration(s)
- Optionally, the platform can provide the ability to accept renewals in person at City Hall over the phone by city staff
- Follow the City-designed processes for review and acceptance of renewals
- Generate documents from templates such as acceptance letters, rejection letters, and payment receipts
- Facilitating and documenting email communication between city staff and users
- Collecting fees and remitting money back to the City

*Handling Non-Compliant Landlords:*

- Identify rentable rental units that have not registered on an ongoing basis
- Generate automated communications to the owner including email, SMS, and physical mail
- Identify non-compliant landlords receiving negative events such as code violations, past due liens, delinquent taxes, and tenant complaints
- Identify rental properties that are sold to a new owner

*Reporting:*

- Ability to create maps in BuildingBlocks by combining registry data with the data that is already being imported. For example:

- Map of all rental units
  - Map of rental units that have received X number of Code Violations over the past Y months
  - Map of rental units that have received X number of Police Incidents over the past Y months
  - Map of rental units that have received X number of Fire Incidents over the past Y months
- Ability to create graphs in BuildingBlocks by combining registry data with the data that is already being imported. For example:
  - Number of rental units broken down by neighborhood
  - Number of rental units broken down by ACES demographic
  - Number of non-compliant units by landlord
  - Number of code violations at rental units over time
- Ability to create ordered lists in BuildingBlocks by combining registry data with the data that is already being imported. These lists are exportable as spreadsheets or shapefiles. For example:
  - All non-compliant rental units sorted by most code violations over the past 24 months
  - All rental units sorted by number of fire incidents over the past 36 months
  - All rental units that have not had a building permit pulled in the past 30 years

### **III. Deployment of Services and Ongoing Support**

Tolemi will work with the Client's designated points of contact to streamline the deployment of Slate. Tolemi will ensure that the application meets current and future organization needs. Key program phases, activities, and timing are detailed below. These are subject to change based on the ability of Tolemi to secure access and/or connections to sources of data, to solicit feedback/direction from the Client may occur concurrently.

#### *Phase 1: Data Integration*

- Tolemi and the Client to confirm preliminary set of data to include in Slate including parcel outlines and master address file
- The Client to provide Tolemi access to data or connection(s) to sources/custodians of data
- Tolemi to perform preliminary data audit, geolocation/spatial join, and field mapping to Slate application data standard
- Tolemi to integrate data from specified systems and to establish schedule for recurring data updates

#### *Phase 2: Application & Data Diagnostic*

- Tolemi to provide documentation of field mapping assumptions for the Client's approval and refine according to the Client's input
- Tolemi to perform comprehensive application diagnostic to evaluate, reconcile, and validate disparate data sets
- Tolemi to execute quality assurance testing of the front-end Slate application

*Phase 3: Workflow Design and Implementation*

- Tolemi to work with Client to understand process requirements
- Client to provide .docx or .XLSX templates of all documents that will need to be automatically generated
- Tolemi to configure the Slate software to meet Clients requirements

*Phase 4: Launch*

- Tolemi to deploy Slate to production environment
- The Client to provide list of named users to receive login credentials to the application
- Tolemi to provide a two-hour user training and up to four hours of one-on-one or small-group
- onboarding sessions for Slate users

*Phase 5: Hosting & Support (Ongoing for Term of License)*

- Tolemi to host the Slate application and the underlying database
- Tolemi to provide ongoing customer support via channels including telephone, email, and online chat
- Tolemi to load additional data sets, as specified by the Client, quarterly beginning no less than three months after conclusion of Launch
- Tolemi to deploy upgrades in concert with ongoing maintenance and improvements of the Slate application

**IV. Rent Registry + Rent Stabilization Modules**

- Stabilized Unit Registration
  - Supports the registration and ongoing tracking of rent-stabilized units, including unit-level attributes, ownership details, and stabilization status. Establishes the official inventory required to administer and enforce the rent stabilization ordinance.
- Change in Rent
  - Enables landlords to report changes in rent and allows staff to review, validate, and track those changes against ordinance-defined limits. Provides a centralized record of rent adjustments to support compliance monitoring, audits, and reporting.
- Change in Tenancy

- Captures changes in tenancy, including move-ins, move-outs, and vacancy events. Ensures accurate tracking of lawful rent resets, vacancy rules, and historical tenancy data for enforcement and analysis.
- Landlord and Tenant Petitions
  - Provides a structured intake and review process for landlord and tenant petitions, including requests for exemptions, hardship adjustments, or ordinance-related appeals. Centralizes documentation, workflows, and outcomes for administrative consistency.
- Automated Rent Stabilization Compliance
  - Applies automated rules and validations across registered units, changes in rent, tenancy changes, and notices to identify potential noncompliance. Reduces manual review effort and supports proactive enforcement through system-generated alerts and flags.

Tolemi expects the completion of phase 1 through phase 4 within 20 weeks from the initial kickoff call. This timeline is subject to change based the ability of Tolemi to secure access and/or data, to solicit feedback & direction from the Client, and to gain the requisite approval to launch.