



# ***CHANGE ORDER: SSRS REPORTING***

**Prepared for:**

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City of Fullerton  
303 W. Commonwealth Ave.  
Fullerton, CA 92832





April 10, 2025

City of Fullerton  
303 W. Commonwealth Ave.  
Fullerton, CA 92832

Dear Gar and Steven:

Thank you for the opportunity to propose a change order for **SSRS Reporting** services. We are excited to continue to work with you on this project.

Glass Box Technology is a deeply experienced IT consulting company. Utilizing 20 years of experience in executive leadership, we combine business insights with technology innovation to fuel growth and position organizations to succeed in a digital economy. Our areas of expertise include technology architecture, cloud strategy, cybersecurity, digital transformation, and data center strategy.

In the following proposal, we outline our additional **SSRS Reporting** services. We are confident that our services will help you develop a roadmap to realize more predictable and agile IT systems, improved speed to market with your IT solutions, and a realistic cost model that the business can afford.

Please feel free to contact me with further questions or clarification items. My contact number is provided below for your convenience. Once again, thank you for the opportunity to submit this proposal for your consideration.

Sincerely,

*Marty Miller*

Vice President – Professional Services  
Glass Box Technology  
(714) 404-3773

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## Overview

This Statement of Work is made this 3<sup>rd</sup> of April 2025 (“Effective Date”), by and between Glass Box Technology Inc., with its principal office located at 2855 Camino Serbal, Carlsbad, CA 92009 (hereinafter referred to as “Glass Box”) and City of Fullerton with its principal place of business at 303 W. Commonwealth Ave., Fullerton CA 92832 (hereinafter referred to as “City of Fullerton”).

Glass Box Technology has been retained by City of Fullerton to develop custom utility reports within the Tyler Munis system to support operational, planning and regulatory needs. These reports were originally custom developed and available in the previous billing system. They need to be recreated in the Tyler Utility Billing software, as the canned reports within the Tyler Suite do not meet the specialized data requirements for regulatory compliance or support staff to continue performing their regular duties.

During the course of developing the custom utility reports to support the Tyler Munis billing system, staff identified a number of technical complexities and integration challenges. Some of these are related to differences in system configuration and data processing between Tyler Munis and the City’s previous billing system. Others have emerged as part of the natural refinement process following system implementation. These factors have not only consumed the original estimated budget but also require additional time for testing, validation, and quality assurance to ensure that all custom reports meet the City’s operational and regulatory reporting standards.

To support these efforts, the City has recently engaged E Source, a consultant with deep expertise in utility data validation and regulatory compliance. E Source, formerly Water Systems Optimization, has worked with numerous agencies across California, including the City of Fullerton through contracts with the Municipal Water District of Orange County (MWDOC). Their support is particularly valuable in ensuring the City’s reports align with the requirements of Senate Bill 555 (SB 555), which mandates for annual water loss audits to be compiled, certified, and submitted. However, E Source is unfamiliar with the Tyler Technologies data structure, source codes, database schema, fields and SSRS reporting structure thus, requiring additional time and resources of the Glass Box team to support E Source’s validation efforts, compile and provide data from multiple database tables, and potentially result in additional custom programming to refine reports based on their feedback.

This Change Order includes funding for the continued development and refinement of the originally defined utility reports and includes additional scope to continue recent collaborations with E Source to validate data integrity and maintain compliance with applicable standards for the Public Works Department.

## Scope of Services

### SSRS Reporting

As part of this Change Order, Glass Box will continue reporting development, and assist with the following:

- Assist E Source Billing Consulting team to review and understand Tyler source codes, database schema / structure, data fields, and report programming structure during data validation efforts.
- Create CSV data exports for E Source Billing Consulting team, upon request, during data validation efforts, to include customer and account information (includes combination of over 50+ Tyler DB tables), date / time fields for proper export functionality, and any additional parameters requested by Staff or E Source for exporting a section of raw data and/or data set(s).

- Complete and/or continue development of the following reports:
  1. **Apportioned Consumption Report:** *consolidates and itemizes the City's monthly water sales and is utilized for various reporting purposes, including submissions to regulatory agencies and water conservation programs.*
    - Continue remaining development of report.
    - Assist E Source with data exports (as defined above) as requested for data validation and review data and/or programming structure(s) upon request.
    - Review findings with E Source and amend any programming needed to refine report for accuracy.
    - Publish agreed upon / finalized report to Tyler Munis database for staff use.
  2. **Extrapolated Consumption Report:** *builds upon the first report (Apportioned Consumption Report) by generating estimates for unfinalized accounts.*
    - Development and testing of report, contingent upon Report #1 completion.
    - Assist E Source with data exports (as defined above) as requested for data validation and review data and/or programming structure(s) upon request.
    - Review findings with E Source and amend any programming needed to refine report for accuracy.
    - Publish agreed upon / finalized report to Tyler Munis database for staff use.
  3. **Block Summary Report:** *also builds upon the first report (Apportioned Consumption Report). The City applies Tiered Billing to residential customers. This report breaks down the water usage by the defined tiers.*
    - Development and testing of report, contingent upon Report #1 completion.
    - Assist E Source with data exports (as defined above) as requested for data validation and review data and/or programming structure(s) upon request.
    - Review findings with E Source and amend any programming needed to refine report for accuracy.
    - Publish agreed upon / finalized report to Tyler Munis database for staff use.
  4. **High Consumption Report:** *compiles the City's top water consumers. The data from this report is frequently requested by Agencies and is used during drought conditions to support customer outreach and conservation efforts.*
    - Continue remaining 40-50% of development of report.
    - Publish agreed upon / finalized report to Tyler Munis database for staff use.
  5. **Meter Install Date Report:** *exports all meter information for a given area. The primary objective of this report is to support the CIP Division in locating water services where a water main replacement is to occur. This report also aids staff from manually compiling necessary data—a process that could take several hours or up to an entire day.*
    - Report complete. However, will need to re-visit report structure and output post Tyler data clean-up efforts.
  6. **MeterGPS Report:** *exports comprehensive meter data for the entire City to facilitate import into the City's GIS system. This report is essential for verifying and updating GIS records, ensuring that staff are working with the most current and accurate information.*
    - Continue remaining 10-20% of development of report.
    - Publish agreed upon / finalized report to Tyler Munis database for staff use.
  7. **Conservation Usage Update / Reads by Account Number Report:** *complements the fourth report (High Consumption Report) by exporting the complete usage history for individual customer accounts. This report is primarily used for customer outreach during drought conditions, enabling staff to highlight historical usage patterns—including peak and low periods—while offering personalized conservation strategies.*

- Report complete. However, will need to re-visit report structure and output post Tyler data clean-up efforts.
- 8. **MWDOC / Meter Read Export Report:** *compiles all meter reads conducted within a specified time period. This report was requested to support compliance with California's 2015 Senate Bill 555 (SB 555), which mandates that all California water agencies complete an annual water loss audit and work toward improving their audit scores. A key component of the audit process involves verifying that the data feeding into the Apportioned Consumption Report (Report #1) has been thoroughly reviewed and validated.*
  - Development and testing of report, contingent upon Report #1 completion.
  - Assist E Source with data exports (as defined above) as requested for data validation and review data and/or programming structure(s) upon request.
  - Review findings with E Source and amend any programming needed to refine report for accuracy.
  - Publish agreed upon / finalized report to Tyler Munis database for staff use.
- Re-review and adjust report structure and programming of all 8 reports post UB and Meter Shop data clean up (at a future date) in the Tyler Munis system to ensure output(s) remain accurate to standard(s) necessary.

## City of Fullerton Responsibilities

City of Fullerton will provide the following items so that Glass Box may complete the outlined scope of work effectively:

- Access to any/all necessary environment(s)
- Access to any/all documentation of City of Fullerton and partner technology environments
- Appropriate workspaces for the proposed resources (if onsite is needed)
- Documentation on personnel, policies, technology, and processes as needed

## Cost and Resources

Service Description	Estimated Hours	Estimated Total Cost
Senior Business Analyst	325	\$32,500.00
Senior Finance Analyst	120	\$19,875.00
Senior Project Manager	75	\$18,750.00
<b>Total</b>	<b>520</b>	<b>\$71,125.00*</b>

\* Plus, reasonable expenses, which include but are not limited to out-of-town travel, meals and lodging, photocopies, and printing, per diem based on GSA schedules and applicable taxes.

Payments are due 30 days after invoice date.

City of Fullerton will only be billed for actual hours used.

## Additional Information

- Pre-Scheduled Work is when City of Fullerton notifies Glass Box at least three business days in advance of date/time
- Glass Box makes no guarantee that resources will be available to respond to emergency requests. Unscheduled requests will be handled using commercially reasonable efforts only.
- Normal Business Hours (NBH) are defined as Monday through Friday 8am-5pm, except for Glass Box holidays.
- A minimum of four hours shall be charged for any work done onsite.
- A minimum of one hour shall be charged for any work done remotely.
- All work shall be billed in 30-minute increments after any minimums have been applied.
- All materials used shall be billed separately.
- Services rendered will be deducted from the posted purchase order. Any purchase order issued under this SOW shall expire within one (1) year of issuance.
- Regular statements of the balance of the agreement will be provided. When the balance has been depleted, further Services are conditioned on City of Fullerton issuance of a new purchase order under this SOW. A new agreement or change request is not required unless Glass Box pricing has changed

## Period of Supplier Performance

Commencement and Completion dates represent a proposed one-year term; actual term will be from the date of the purchase order until the expiration of the last purchase order issued hereunder.

Either Party may terminate the SOW for any reason on thirty (30) days prior written notice to the other Party. Upon any such termination,

Glass Box will be paid all fees and expenses which have been incurred or earned in connection with the performance of the Services through the effective date of such termination. Additionally, in the event City of Fullerton cancels any Services with less than one (1) week prior notice, City of Fullerton shall reimburse Glass Box for any non-refundable expenses incurred in preparation for such cancelled Services.

## Fees and Payment

- The pricing in this SOW is valid for 60 days from delivery to City of Fullerton.
- City of Fullerton shall pay, in accordance with the relevant terms and conditions of the agreement, a fee for Glass Box's performance of services for the project.
- Except pursuant to a City of Fullerton request, City of Fullerton will only be billed for services rendered, with prior City of Fullerton approval. Under no circumstances shall any purchase order furnished by City of Fullerton be construed as a minimum purchase commitment on the part of City of Fullerton.
- Payments are due to Glass Box within 30 days after City of Fullerton receipt of an invoice against this agreement.

## Disclaimer

- Glass Box will not be liable for any failure to perform the services, to the extent that the failure is caused by City of Fullerton lack of cooperation.
- Glass Box will not be held responsible for data loss. Backups should be performed prior to work starting. All data is the responsibility of City of Fullerton.
- Glass Box will not be held liable for software license compliance. Software license compliance is between City of Fullerton and the software company.
- Glass Box will not be held for additional work not listed in the SOW. An addendum must be written and approved by both Glass Box and City of Fullerton before additional work can be started.
- Glass Box will not be held responsible for delays or failures to perform hereunder due to causes beyond its reasonable control (including, without limitation, acts of God, fire, flood, war, explosion, sabotage, terrorism, embargo, civil commotion, acts or omissions of any government entity, supplier delays, communications or power failure, equipment or software malfunction, or labor disputes.)
- Glass Box will not be held responsible for delays or failures to perform related to custom configured or specialized hardware or software needing modification by the manufacturer.
- Glass Box will not be held responsible for delays or failures to perform related to data conversion being performed by custom configured or specialized software manufacturer.



- City of Fullerton represents and warrants that it has all right, title and interest in and to any data furnished in connection with the services and/or that it has obtained all necessary consents, permissions and releases necessary for Glass Box to perform its obligations under this SOW.

**The quote is effective as of the last signature date below. All other terms of the prior Agreement shall remain the same.**

**Each Party hereby acknowledges and confirms that it has read this SOW and accepts and approves the scope of work and terms and conditions. Each Party understands that should additional work be required that by its nature could not have been known or determined at the time this SOW was executed, a mutually agreeable written change-order describing the additional work and any related expenses will be required.**

**This SOW must be signed and returned before work can begin. Please sign and return to Glass Box.**

**IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by their duly authorized representatives as of the Effective Date.**

**Client: City of Fullerton**

**Glass Box Technology, Inc.**

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_