

CITY OF NORTH MIAMI PROFESSIONAL SERVICES AGREEMENT

THIS PROFESSIONAL SERVICES AGREEMENT (“Agreement”) is entered into this day of 4/3/2018, 2018, between the **City of North Miami**, a Florida municipal corporation with a principal address of 776 NE 125th Street, North Miami, Florida (“City”), and **Woolpert, Inc.**, a foreign profit corporation registered and authorized to do business under the laws of the State of Florida, having its principal office at 4454 Idea Center Blvd., Dayton, OH 45430 (“Vendor”). The City and Vendor shall collectively be referred to as the “Parties”, and each may individually be referred to as a “Party”.

RECITALS

WHEREAS, the City has a need for an experienced Enterprise Asset Management Software implementer; and

WHEREAS, based on the City’s assessment of Vendor’s qualifications, experience and pricing, Vendor was selected to provide the Services defined herein; and

WHEREAS, on February 27, 2018, the Mayor and City Council passed and adopted Resolution No. 2018-R-28, authorizing the City Manager to execute this Agreement for the provision of Services, as beneficial to the health, safety and welfare of all City residents.

NOW, THEREFORE, in consideration of the mutual terms and conditions set forth herein and other good and valuable consideration, the Parties hereto agree as follows:

ARTICLE 1 - RECITALS

1.1 The recitals are true and correct and are hereby incorporated into and made a part of this Agreement.

ARTICLE 2 - CONTRACT DOCUMENTS

2.1 The following documents are incorporated into and made a part of this Agreement (collectively referred to as the "Contract Documents"):

2.1.1 Vendor’s proposal dated February 1, 2018 including Exhibit A – Fee Schedule and Exhibit B – Scope of Services;

2.1.2 Resolution No. 2018-R-28, passed and adopted by the Mayor and City Council on February 27, 2018, approving Vendor’s selection and authorizing the execution of this Agreement;

2.1.3 Any additional documents which are required to be submitted by Vendor under this Agreement.

2.2 In the event of any conflict between the Contract Documents or any ambiguity or missing specification or instruction, the following priority is hereby established:

- 2.2.1 Specific written direction from the City Manager or City Manager's designee.
- 2.2.2 This Agreement.
- 2.2.3 The Proposal.

ARTICLE 3 – TERM

- 3.1 The Parties agree that subject to authorized adjustments, the Initial Term of this Agreement shall be through January 13, 2024, commencing on the date of the Notice to Proceed.
- 3.2 Following the Initial Term, the City, at its discretion and with the consent of the Vendor, may renew the Agreement under all of the terms and conditions contained in this Agreement for two (2) additional five (5) year periods.
- 3.3 When, in the opinion of the City, reasonable grounds for uncertainty exist with respect to the Vendor's ability to perform Services or any portion thereof, the City may request that the Vendor, within a reasonable time frame set forth in the City's request, provide adequate assurances to the City in writing, of Vendor's ability to perform in accordance with terms of this Agreement. In the event that the Vendor fails to provide the City the requested assurances within the prescribed time frame, the City may treat such failure as a repudiation or breach of this Agreement, and resort to any remedy for breach provided for in this Agreement or at law.
- 3.4 Notwithstanding the provisions of this Article 3, this Agreement may be terminated by the City at any time, with or without cause.

ARTICLE 4 - COMPENSATION

- 4.1 The Contractor shall be paid an amount not to exceed One Hundred Ninety Eight Thousand Seven Hundred Eighteen Dollars (\$198,718.00) as full compensation for the provision of Services, for the Initial Term.
- 4.2 Funding for this Agreement is contingent on the availability of funds and the Agreement is subject to amendment or termination due to lack of funds or a reduction of funds, upon ten (10) days written notice to Vendor.

ARTICLE 5 - SCOPE OF SERVICES

- 5.1 Vendor agrees to perform Services for the benefit of the City under the special terms, schedules, and conditions set forth in the Contract Documents. Vendor shall perform Services in accordance with that degree of care and skill ordinarily exercised by reputable members of its profession.
- 5.2 Vendor represents and warrants to the City that: (i) Vendor possesses all qualifications, licenses and expertise required in the provision of Services, with personnel fully licensed by the State of Florida; (ii) Vendor is not delinquent in the payment of any sums due the City, including payment of permit fees, local business taxes, or in the performance of any obligations to the City; (iii) all personnel assigned to perform work shall be, at all times during the term hereof, fully qualified and trained to perform the tasks assigned to each; (iv) the Services will be performed in the manner as described in the Contract Documents for the budgeted amounts, rates and schedules;

and (v) the person executing this Agreement on behalf of Vendor is duly authorized to execute same and fully bind Vendor as a Party to this Agreement.

5.3 Vendor is fully responsible for completion of the Services required by this Agreement and for completion of all subcontractor work, if authorized as provided herein. Vendor shall not subcontract any work under this Agreement to any subcontractor other than the subcontractors specified in the proposal and previously approved by the City, without the prior written consent of the City, which shall be determined by the City in its sole discretion.

5.4 Vendor warrants that any and all work, materials, services or equipment that may reasonably be inferred from the Contract Documents as being required to produce the intended result, will be supplied by the Vendor at its own cost, whether or not specifically called for.

ARTICLE 6 - CITY'S TERMINATION RIGHTS

6.1 The City shall have the right to terminate this Agreement, in its sole discretion at any time, with or without cause, upon ten (10) days written notice to Vendor. In such event, the City shall pay Vendor compensation for Services rendered prior to the effective date of termination. The City shall not be liable to Vendor for any additional compensation, or for any consequential or incidental damages.

ARTICLE 7 - INDEPENDENT CONTRACTOR

7.1 Vendor, its employees and agents shall be deemed to be independent contractors and not agents or employees of the City and shall not attain any rights or benefits under the civil service or pension ordinances of the City, or any rights generally afforded to classified or unclassified employees. The Vendor shall not be deemed entitled to the Florida Workers' Compensation benefits as an employee of the City.

ARTICLE 8 - DEFAULT

8.1 In the event the Vendor fails to comply with any provision of this Agreement, the City may declare the Vendor in default by written notification. The City shall have the right to terminate this Agreement if the Vendor fails to cure the default within ten (10) days after receiving notice of default from the City. If the Vendor fails to cure the default, the Vendor will only be compensated for completed Services. In the event partial payment has been made for such Services not completed, the Vendor shall return such sums due to the City within ten (10) days after notice that such sums are due. The Vendor understands and agrees that termination of this Agreement under this section shall not release Vendor from any obligations accruing prior to the effective date of termination.

ARTICLE 9 - ERRORS AND OMISSIONS

9.1 Vendor shall be responsible for deficient conduct and reporting due to Vendor's errors and omissions, and shall promptly correct or replace all such deficiencies without cost to City. The Vendor shall also be responsible for all damages resulting from such errors and omissions. Payment in full by the City for Services performed does not constitute a waiver of this representation.

ARTICLE 10 - INDEMNIFICATION

10.1 Vendor agrees to indemnify, defend, save and hold harmless the City its officers, agents and employees, from and against any and all claims, liabilities, suits, losses, claims, fines, and/or causes of action that may be brought against the City, its officers, agents and employees, on account of any negligent act or omission of Vendor, its agents, servants, or employees in the performance of Services under this Agreement and resulting in personal injury, loss of life or damage to property sustained by any person or entity, to the extent caused by Vendor's negligence within the scope of this Agreement, including all costs, reasonable attorney's fees, expenses, including any appeal, and including the investigations and defense of any action or proceeding and any order, judgment, or decree which may be entered in any such action or proceeding, except for damages specifically caused by or arising out of the negligence, strict liability, intentional torts or criminal acts of the City, its officer, agents, employees or contractors, which claims are lodged by any person, firm, or corporation.

10.2 Nothing contained in this Agreement is any way intended to be a waiver of the limitation placed upon the City's liability as set forth in Chapter 768, Florida Statutes. Additionally, the City does not waive sovereign immunity, and no claim or award against the City shall include attorney's fees, investigative costs or pre-judgment interest.

ARTICLE 11 - INSURANCE

11.1 Prior to the execution of this Agreement, the Vendor shall submit certificate(s) of insurance evidencing the required coverage and specifically providing that the City is an additional named insured or additional insured with respect to the required coverage and the operations of the Vendor under this Agreement. Vendor shall not commence work under this Agreement until after Vendor has obtained all of the minimum insurance and the policies of such insurance detailing the provisions of coverage have been received and approved by the City. Vendor shall not permit any subcontractor to begin work until after similar minimum insurance to cover subcontractor has been obtained and approved. In the event the insurance certificate provided indicates that the insurance shall terminate and lapse during the term of this Agreement, Vendor shall furnish, at least thirty (30) calendar days prior to expiration of the date of the insurance, a renewed certificate of insurance as proof that equal and like coverage and extension is in effect. Vendor shall not continue to perform the Services required by this Agreement unless all required insurance remains in full force and effect.

11.2 All insurance policies required from Vendor shall be written by a company with a Best rating of B+ or better and duly authorized and licensed to do business in the State of Florida and be executed by duly licensed agents upon whom service of process may be made in Miami-Dade County, Florida.

ARTICLE 12 - OWNERSHIP OF DOCUMENTS

12.1 The Vendor shall retain all rights to Vendor's previously developed details, specifications, data, software, documentation, and deliverables adapted from such previously developed items (collectively "Vendor Intellectual Property"). The City shall receive a non-exclusive, non-transferrable, limited license to use such Vendor Intellectual Property, provided by Vendor under this Agreement in connection with the use of the deliverables for the City's operational purposes. With the exception of Vendor Intellectual Property, all documents developed by Vendor under this Agreement shall be delivered to the City by the Vendor upon completion of the Services and shall become property of the City, without restriction or limitation of its use. The Vendor agrees that all

documents generated hereto shall be subject to the applicable provisions of the Public Records Law, under Chapter 119, Florida Statutes (2017).

12.2 The Vendor shall additionally comply with Section 119.0701, Florida Statutes, including without limitation, the following conditions: (1) keep and maintain public records that ordinarily and necessarily would be required by the City to perform this service; (2) provide the public with access to public records on the same terms and conditions as the City would at the cost provided by Chapter 119, Florida Statutes, or as otherwise provided by law; (3) ensure that public records that are exempt or confidential and exempt from disclosure are not disclosed, except as authorized by law; (4) meet all requirements for retaining public records and transfer, at no cost to the City, all public records in its possession upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from disclosure requirements; and (5) all electronically stored public records must be provided to the City in a format compatible with the City’s information technology systems.

12.3 It is further understood by and between the Parties that any information, writings, tapes, Contract Documents, reports or any other matter whatsoever which is given by the City to the Vendor pursuant to this Agreement shall at all times remain the property of the City and shall not be used by the Vendor for any other purposes whatsoever without the written consent of the City.

12.4 In the event the Agreement is terminated, Vendor agrees to provide the City all such documents within ten (10) days from the date the Agreement is terminated.

ARTICLE 13 - NOTICES

13.1 All notices, demands, correspondence and other communications between the Parties shall be deemed sufficiently given under the terms of this Agreement when dispatched by registered or certified mail, postage prepaid, return receipt requested, addressed as follows or as the same may be changed from time to time:

For Vendor: Woolpert, Inc.
NRAI SERVICES, INC, Registered Agent
1200 South Pine Island Road
Plantation, FL 33324

With copy to: Woolpert, Inc.
Attn: Dave Feur
4454 Idea Center Blvd.
Dayton, OH 45430

With copy to: Woolpert, Inc.
Attn: Legal Department
4454 Idea Center Blvd.
Dayton, OH 45430

For the City: City of North Miami
Attn: City Manager

776 N.E.125th Street
North Miami, Florida 33161

With copy to: City of North Miami
Attn: City Attorney
776 N.E.125th Street
North Miami, Florida 33161

13.2 Either Party may at any time designate a different address and/or contact person by giving notice as provided above to the other Party. Such notices shall be deemed given upon receipt by the addressee.

13.3 In the event there is a change of address and the moving Party fails to provide notice to the other Party, then notice sent as provided in this Article shall constitute adequate notice

ARTICLE 14 - CONFLICT OF INTEREST

14.1 Vendor represents and warrants to the City that it has not employed or retained any person or company employed by the City to solicit or secure this Agreement and that it has not offered to pay, paid, or agreed to pay any person any fee, commission, percentage, brokerage fee, or gift of any kind contingent upon or in connection with, the award of this Agreement.

14.2 Vendor covenants that no person under its employ who presently exercises any functions or responsibilities on behalf of the City in connection with this Agreement has any personal financial interest, directly or indirectly, with contractors or vendors providing professional services on projects assigned to the Vendor, except as fully disclosed and approved by the City. Vendor further covenants that, in the performance of this Agreement, no person having such conflicting interest shall be employed.

ARTICLE 15 - MISCELLANEOUS PROVISIONS

15.1 No waiver or breach of any provision of this Agreement shall constitute a waiver of any subsequent breach of the same or any other provision hereof, and no waiver shall be effective unless made in writing.

15.2 All representations, indemnifications, warranties and guarantees made in, required by, or given in accordance with this Agreement, as well as all continuing obligations indicated in the Contract Documents, shall survive final payment, completion and acceptance of the Services and termination or completion of the Agreement.

15.3 Should any provision, paragraph, sentence, word or phrase contained in this Agreement be determined by a court of competent jurisdiction to be invalid, illegal or otherwise unenforceable under the laws of the State of Florida, such provision, paragraph, sentence, word or phrase shall be deemed modified to the extent necessary in order to conform with such laws, or if not modifiable, then same shall be deemed severable, and in either event, the remaining terms and provisions of this Agreement shall remain unmodified and in full force and effect or limitation of its use.

15.4 This Agreement and Contract Documents constitute the sole and entire agreement between the Parties. No modification or amendments to this Agreement shall be binding on either Party unless in writing and signed by both Parties.

15.5 This Agreement shall be construed and enforced according to the laws of the State of Florida. Venue in any proceedings between the Parties shall be in Miami-Dade County, Florida.

15.6 The City reserves the right to audit the records of the Vendor covered by this Agreement at any time during the provision of Services and for a period of three years after final payment is made under this Agreement.

15.7 The Vendor agrees to comply with and observe all applicable federal, state, and local laws, rules, regulations, codes and ordinances, as they may be amended from time to time.

15.8 Services shall not be subcontracted, transferred, conveyed, or assigned under this Agreement in whole or in part to any other person, firm or corporation without the prior written consent of the City.

15.9 The City of North Miami is exempt from Federal Excise and State taxes. The applicable tax exemption number or certificate shall be made available upon request.

15.10 The professional Services to be provided by Vendor pursuant to this Agreement shall be non-exclusive, and nothing herein shall preclude the City from engaging other firms to perform Services.

15.11 This Agreement shall be binding upon the Parties herein, their heirs, executors, legal representatives, successors and assigns.

15.12 The Vendor agrees that it shall not discriminate as to race, sex, color, creed, national origin, or disability, in connection with its performance under this Agreement.

15.13 All other terms, conditions and requirements which have not been modified by this Agreement, shall remain in full force and effect.

15.14 In the event of any dispute arising under or related to this Agreement, the prevailing Party shall be entitled to recover all actual attorney fees, costs and expenses incurred by it in connection with that dispute and/or the enforcement of this Agreement, including all such actual attorney fees, costs and expenses at all judicial levels, including appeal, until such dispute is resolved with finality.

15.15 This Agreement may be executed in two or more counterparts, each of which shall constitute an original but all of which, when taken together, shall constitute one and the same Agreement.

IN WITNESS WHEREOF, the Parties have executed this Agreement by their respective proper officers duly authorized the day and year first written above.

ATTEST:
Corporate Secretary or Witness:

Woolpert, Inc., a foreign corporation:
"Vendor"

By: DocuSigned by:
Victoria Elrod
ECA5EB34BF0643D...

By: DocuSigned by:
Dave Feuer
DFE36EA3450D4B2...

Print Name: Victoria Elrod

Print Name: Dave Feuer

Date: 3/29/2018

Date: 3/29/2018

ATTEST:

City of North Miami, a Florida municipal corporation:
"City"

By: DocuSigned by:
Michael A. Etienne
2C7010672EE8414...
Michael A. Etienne
City Clerk

By: DocuSigned by:
Larry Spring
C23984DEA2724CF...
Larry M. Spring, Jr.
City Manager

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:

By: DocuSigned by:
Jeff P. H. Cazeau
3C2C76D6D7D5464...
Jeff P. H. Cazeau
City Attorney



November 29, 2017

Chuks Okereke
City of North Miami
1815 NE 150 Street
North Miami, FL 33181

RE: Proposed Statement of Work for a Cityworks Asset Management System Implementation – Revised Exhibit A - Fee Schedule

Dear Chuks Okereke:

As recently discussed, please accept this as a revised fee schedule to be more in line with that of the Collier County Asset Management contract. In an attempt to get this to you as soon as possible, I am not including a revised scope of work. The scope of work will remain as proposed, however the fee schedule has been re-organized as shown on the following page.

Should you have any questions at all, please never hesitate to call or email at any time.

Sincerely,
Woolpert, Inc.



John Cestnick, PSM, IAM
Senior Associate

Woolpert, Inc.
6100 Blue Lagoon Drive, Suite 440
Miami, FL 33126
305.418.9370

Revised Fee Schedule
November 29, 2017

Page 2

Exhibit A - Fee Schedule

ITEM	PHASE	LUMP SUM AMOUNT	TIME AND MATERIALS – NOT TO EXCEED
1	PHASE PM PROJECT MANAGEMENT	\$ 22,949.00	\$ 0.00
2	PHASE QMP QUALITY MANAGEMENT PROGRAM	\$ 7,105.00	\$ 0.00
3	TRACKS 1 AND 2 CORE CITYWORKS AMS IMPLEMENTATION (GIS-BASED ASSET MANAGEMENT / GIS-BASED INVENTORY / WORK ORDER)	\$ 154,826.00	\$ 0.00
4	TRACK 3 GE WORKFLOW IMPLEMENTATION (GIS-BASED SCADA INTEGRATION)	*NA	*NA
5	TRACK 4 CUSTOM UBCS IMPLEMENTATION (GIS-BASED CUSTOMER MANAGEMENT SYSTEM)	*NA	*NA
6	TRACK 5 RIVA DS IMPLEMENTATION (CIP GENERATION AT LONG AND SHORT INTERVALS)	*NA	*NA
7	GIS DATABASE SUPPORT	\$ 7,550.00	\$ 0.00
8	MATERIALS MANAGEMENT / INVENTORY OPTIMIZATION (STOREROOM)	*NA	*NA
9	ENTERPRISE CONTENT MANGEMENT SYSTEM INTEGRATION EVALUATION	*NA	*NA
10	CUSTOM DEVELOPMENT OF CITYWORKS AMS FUNCTIONALITY	\$ 6,288.00	\$ 0.00
11	SOFTWARE COSTS (** See Note Below)	*NA	*NA
	Subtotal Lump Sum Items	\$ 198,718.00	
	Subtotal of Time and Materials		\$0.00
	Travel Costs (included in costs of the Tracks above)	\$ 19,215.00	
	TOTAL FEE (Total Items 1-11)	\$ 198,718.00	

* Items marked with a cost of "NA" indicates that item as not being provided as part of the proposed scope of services.

** Software costs are being provided and negotiated directly with the software vendor. No software is include within the proposed scope of services.

City of North Miami, Florida

Exhibit B

Cityworks AMS Implementation Implementation Services Statement of Work

March 15, 2018

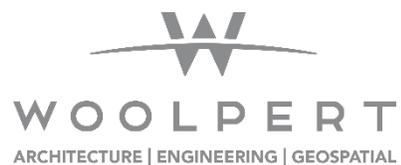


Exhibit B

Implementation Services Statement of Work

Cityworks AMS Implementation

Woolpert, Inc.

Information Technology & Management Consulting Practice

March 15, 2018

Prepared by Woolpert, Inc.
6100 Blue Lagoon Drive, Suite 440
Miami, FL 33126

www.woolpert.com

Quality

At Woolpert, quality is the cornerstone of our business. We invite your comments and suggestions for improving this document.

Trademarks

All brand names and product names are trademarks or registered trademarks of their respective companies.

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Document Change Control

Table 1: Document Change Control

Change Record			
Date	Author	Version	Change Reference
2017.09.25	John Cestnick	1.0	Draft for review only

File name: [City of North Miami SOW_Exhibit B.docx](#)



General

Woolpert's Enterprise Asset Management System implementations are focused on delivering a comprehensive set of technology tools and asset management best practices that support our Clients' planned asset sustainability performance objectives. We achieve our Clients' objectives by first understanding their **Implementation Vision** and then defining the **Planned Performance Management** strategies to achieve the vision. We then design and deploy the **Performance Management System Applications** required to support sustained **Performance Management & Monitoring**.

There are many related tasks and sub-tasks that have to be properly executed to ensure a successful outcome of a high-value Enterprise Asset Management System deployment. **Woolpert's project methodology fully addresses all aspects of this complex project and ensures all critical success factors are fully addressed in a logical order.**

Services, and their associated deliverables, are categorized into five (5) major phases, as more fully detailed in the following sections. Completion of each phase will culminate with the execution of a Phase Acceptance and Close document signifying the City's acceptance of the services rendered to date and authorization for Woolpert to proceed with work on the subsequent task.

Our project plan and associated budget and schedule were developed with the bounding assumptions below, which were based on discussions with City staff.

- The following Departments/Divisions will be implemented per this Statement of Work (SOW):
 - Utilities Department
 - Water Distribution
 - Water Production (1 Plant)
 - Wastewater Collection
- The system will support a multitude of service request, work order, and inspection workflows.
- Work orders will be configured to support the range of maintenance activities including preventative maintenance, scheduled corrective maintenance, and unplanned reactive maintenance.
- Unless otherwise specified within this SOW, the City will be responsible for the development and management of an ArcGIS/ArcSDE geodatabase and ArcGIS Server deployment and the population of said geodatabase with all asset records and associated attribute details. Woolpert will provide minimum and recommended specifications for this upon request.
- The City is to identify and empower a Project Manager.
- The City is to identify and empower two power users from each of the user divisions to be implemented (Water Distribution, Water Production, and Wastewater Collection) for a total of six (6) power users and one project manager. This will constitute the City Core Team.



Figure 1: Enterprise Asset Management Implementation – Guiding Principles

Project Management

An Enterprise Asset Management system implementation is a complex endeavor that presents a variety of technical and organizational challenges that will need to be identified, analyzed, understood, and continually managed in order to ensure a successful outcome. Woolpert’s Project Management approach provides for the resources and tools needed to successfully manage the project through all phases/processes, including:

- **Initiation.** Project authorizations and expectations.
- **Planning.** Project definitions, objectives, deliverables, and analysis of alternatives.
- **Execution.** Coordination of resources, quality management, and product and service delivery.
- **Monitoring and Controlling.** Monitoring and measuring to identify variances and imitate corrective actions.
- **Close-Out.** Acceptance of project deliverables and results.

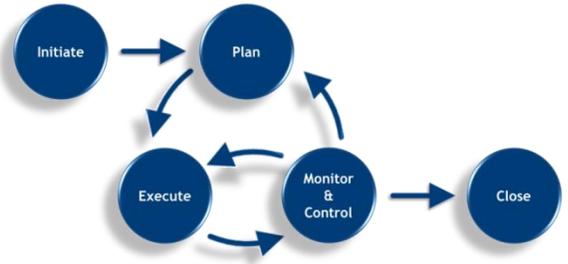


Figure 2: Project Life-Cycle Process Groups

To fulfill each of these objectives, Woolpert will employ the different project management tools described in the following sections.

Task PM.1: Project Administration

Woolpert will provide the following general project management services:

- Develop, in cooperation with the City’s project manager, a project plan and schedule.
- Proactively manage and update project plan and schedule, as required, throughout the duration of the project. Project plan and schedule modifications will be facilitated upon common agreement between the City and Woolpert in accordance with the issue control process detailed in the project plan.
- Coordinate project events with the City’s project manager and Woolpert team members.
- Author, edit, review, and distribute project documentation and technical reports as required.
- Facilitate in-process review meetings with the City’s project manager, committees, management, and end-users as scheduled and appropriate throughout the duration of the project.
- Maintain a secure project collaboration website to post project schedule details, in-process tasks and responsible parties, technical documentation, as well as other project collaboration tools.
- Perform miscellaneous project administration (e.g., arrange travel, internal project updates).
- Anticipate problem areas and propose and facilitate solutions.

Deliverables

- Draft and final project plan.
- Monthly project status reports.
- On-going project management, including resource allocation, invoicing and general consulting.
- Password-protected project collaboration environment and issue log management.

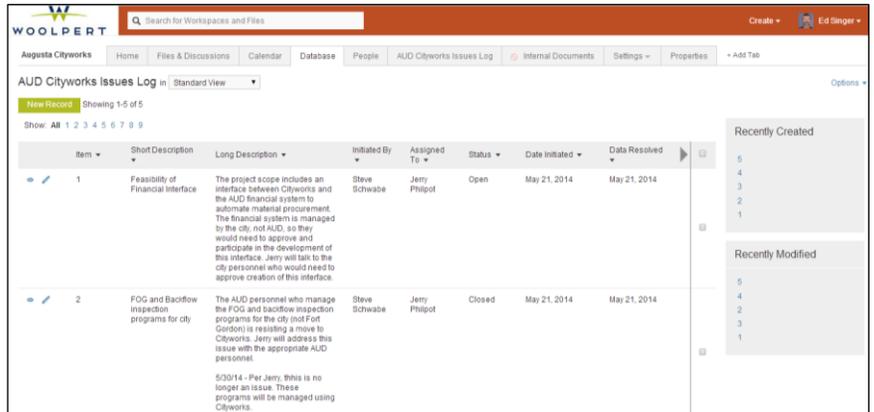


Figure 3: Woolpert’s Project Collaboration Website



Assumptions

- The activities discussed in this section will begin once a Written Notice-to-Proceed is received from the City.

City Responsibilities

- Assemble a team of domain and technical experts and have representation of all divisions/work groups involved throughout all phases of the project.
- Provide a point of contact for all project management issues and questions.
- Review, comment and accept draft project work plan within five days of document delivery.
- Schedule appropriate internal staff and provide facilities for on-site meetings and off-site conference calls.
- Review and accept project status reports, or otherwise provide comments on same, within a reasonable time frame.

Task PM.2: Project Kick-Off Meeting

As soon as is reasonably feasible, following receipt of the Written Notice to Proceed, Woolpert’s project manager will work with the City’s project manager to schedule a Project Kick-Off Meeting. This meeting will be facilitated on-site at the City’s facilities for the purpose of: 1) establishing the necessary project management protocols to be adhered to by all stakeholders, 2) reviewing the City’s implementation goals and objectives with all team members, 3) identifying any City-owned source documentation necessary to support the project, 4) identifying all critical path schedule milestones, and 5) addressing any outstanding scope or schedule questions that City stakeholders may have. Said meeting shall be of a duration suitable for addressing each of the items previously listed. Development of the kick-off meeting agenda shall be the joint responsibility of Woolpert’s and the City’s project managers.

Deliverables

- Kickoff meeting agenda.
- On-site project kick-off meeting (half day).

Assumptions

- The activities discussed in this section will begin once a Written Notice-to-Proceed is received from the City.

City Responsibilities

- Schedule meeting space and supporting technology peripherals suitable for the kick-off meeting.
- Coordinate and schedule meeting attendees.

Task PM.3: Project Schedule Coordination

Project schedule coordination and management will be performed using Microsoft Project software. Project schedules and tasks will be monitored and adjusted as needed, depending upon the City’s priorities and ability make its staff and facilities available at the appropriate times throughout the project. An updated project schedule delineating resources, scheduled tasks, and completed tasks will be maintained and available to all Woolpert and City project participants.

Deliverables

- Project schedule maintained and monitored on an on-going basis.

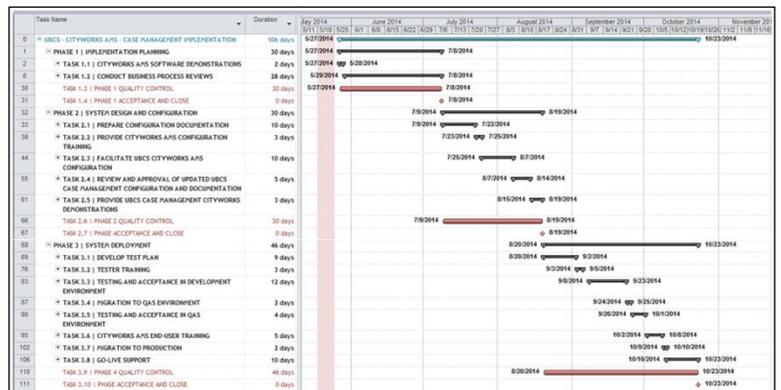


Figure 4: Microsoft Project Gantt Chart



Assumptions

- The activities discussed in this section will begin once a Written Notice-to-Proceed is received from the City.

City Responsibilities

- Review project schedule on an on-going basis.

Task PM.4: City Status Meetings

Woolpert will facilitate a regularly occurring status meeting. Woolpert's project manager will participate in regularly scheduled project status meetings with the City's project manager and designees for the purpose of reviewing project issues including: 1) activities, action items, and deliverables completed to date; 2) activities, action items, and deliverables in process or scheduled; and 3) technical or contractual issues that require corrective action. Woolpert meeting participants will include Woolpert's project manager and ad hoc team members, as required. City meeting participants will be as deemed necessary by the City's project manager or as requested by Woolpert's project manager.

When feasible, City Status Meetings will be held on-site at the City's facilities in conjunction with other scheduled on-site tasks. Otherwise, City Status Meetings will be facilitated remotely using teleconference and web meeting tools.

Deliverables

- Monthly project status reports upload to project website.
- Monthly project status meetings.

Assumptions

- The activities discussed in this section will begin once a Written Notice-to-Proceed is received from the City.

City Responsibilities

- Schedule appropriate internal staff and provide facilities for on-site meetings and off-site conference calls.
- Review and accept project status reports, or otherwise provide comments on same, within a reasonable time frame.
- Schedule meeting space and supporting technology peripherals suitable for on-site meetings.
- Coordinate and schedule meeting attendees.

Task PM.5: Internal Coordination Meetings

Internal coordination meetings will be held on a regular basis to ensure continuous communication about tasks in process, scheduled tasks, and any issues impacting a successful implementation. Woolpert's project manager will also utilize these meetings to gather information from project team members required to manage on-going resource loading.

Deliverables

- Regularly scheduled internal coordination meetings.

Assumptions

- The activities discussed in this section will begin once a Written Notice-to-Proceed is received from the City.

City Responsibilities

- None.

Change Control

This section defines how changes to the original objectives and/or deliverables defined in this Statement of Work will be handled. Both Woolpert and the City recognize that changes are a normal part of the project life cycle. Woolpert believes that managing change to project scope, cost, and schedule are critical to a project's success and employs a comprehensive approach to change control. Woolpert's established change control process is documented below.

Any project team member (City or Woolpert) may initiate a Change Request whenever there is a perceived need for a change that will affect the desired or anticipated outcome of the work or any element of the project. The project team member will use a Change Control Notice (CCN) form as appropriate for the change:

- Agreement to a Change Request signifies agreement to a change in overall costs, functionality, time scales, or other identified project impact.
- Changes will be identified and communicated by/to the respective Project Managers using any of the prescribed communication channels. Change Requests may be introduced via verbal conversation or other form of communication but must be supported by the appropriate CCN document.
- All CCN's will be signed by both the City and Woolpert Project Managers to indicate acceptance of the changes.
- All project participants should understand that time is of the essence when initiating, reviewing, negotiating, and approving Change Requests, as any delays to work in progress caused by a CCN may impact the overall project schedule and budget.

All request changes should be managed from their initiation through to their completion (acceptance or rejection) within five (5) business days from the start of the process. If the City and Woolpert project managers cannot reach common agreement on the request change within this time frame, the issue will be elevated to the next level of management (both City and Woolpert) for resolution. During the resolution process, all downstream project tasks potentially impacted by the requested change will be placed on hold until such time that resolution is achieved.



WOOLPERT
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Change Control Notice-04
*Enterprise Asset Management System
Implementation*

To: Mr. Asset Manager, PE - Project Manager
From: Edward Singer, PE - Project Director
Date: May 5, 2014; Revised May 13, 2014; Approved June 2, 2014
Subject: Change control Notice 04 - Cityworks AMS Configuration for UBICS Case Management

This Change Control Notice is intended to modify the referenced Project Plan (Scope of Services) as indicated below:

Original Scope of service: The original Contract / Scope of Services provided for Woolpert developing a series of custom applications to replace CCPUD's current UBICS CRM application. The effort was scoped to include a total of five (5) modules:

- Service Roll
- Case Management
- Commercial Recycling
- Capital Roll
- Estoppel Letters

The original custom application development efforts were scoped as TRACK 4 | CUSTOM UBICS CRM IMPLEMENTATION (GIS-BASED CUSTOMER MANAGEMENT SYSTEM) [TIME & MATERIAL]. The original Project Tasks / Fees are as provided for in Attachment 1 to this CCN.

Proposed Change: Through the various application discovery and planning efforts completed to date, it was determined that the UBICS Case Management business requirements could almost entirely be met through standard configuration of the Cityworks AMS application. It was also discovered that in order for the Service Roll module (first priority - scheduled to be completed in the October 2014 time frame) to be fully functional in a production environment and without the need to run parallel systems (old application plus new application) for an extended period, the UBICS Case Management solution would also need to be operational in the October timeframe.

In order to accommodate the changed requirements of the Case Management module (standard Cityworks AMS configuration versus custom application development), as well as getting it operational in a production environment in time for an October Service Roll go-live, Woolpert has prepared a standard Cityworks AMS implementation scope of services that is to be performed in parallel with the original CCPUD EAMS implementation Tracks 1 and 2 efforts.

WOOLPERT, INC.
10900 NW 28th STREET, SUITE 100 | HEALEY, FL 33172
305-418-9370 | WOOLPERT.COM

Figure 5: Sample Change Control Notice

The following workflow diagram graphically depicts the above detailed process:

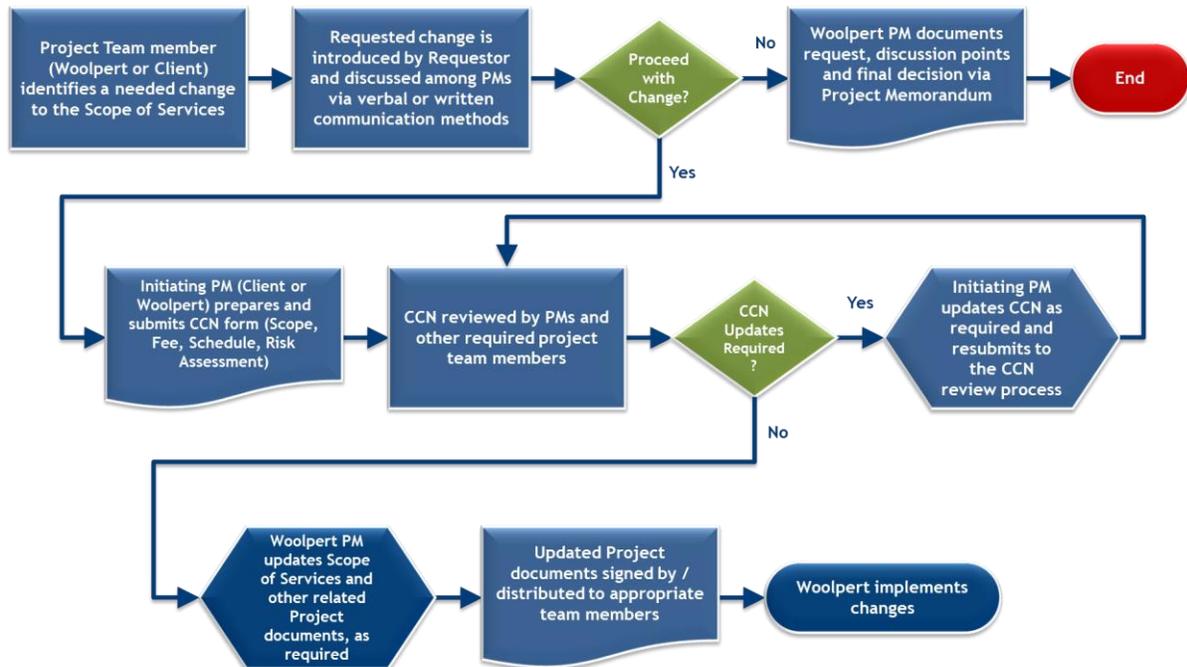


Figure 6: Change Control Process

Each Change Control Notice (CCN) will clearly document the following:

- Date.
- Change Control Number.
- CCN Initiated By.
- Original Scope of Services (language from the original scope that is being considered for change).
- Proposed Change (narrative of the proposed change(s) being sought).
- Schedule Impact (details about the proposed change(s) impact to the overall project schedule).
- Fee Impact (details on the proposed change(s) impact to the project budget).
- Risk Assessment (narrative discussion about the risks the proposed change(s) will introduce to the project and the ways in which said risk will be mitigated).
- Acceptance Signatures (Woolpert and City project managers).

Technical Approach

Woolpert has developed a five-phased approach to implementing content-rich enterprise asset management solutions. Each of the five technical phases are executed in conjunction with continuous Project Management, Knowledge Transfer & Change Management, and Quality Management activities. Deliberate execution of each phase with continuous City involvement and feedback enables Woolpert to ensure a successfully planned, designed, configured, and deployed asset management solution that is used and useful immediately upon “Go-Live,” provides for the tools and resources needed to support current and planned asset management activities, and provides the means to monitor and measure continuous improvement activities.

Each of our five phases are performed in order, with specific phase deliverables achieving City sign-off in each of the appropriately defined tasks or sub-tasks. The culmination of each phase is solidified by a Phase Acceptance and Close-out process that signifies delivery and acceptance of the Phase Tasks/Sub-Tasks and clears the way to proceed with the next subsequent phase.

Each of the five phases, depicted in the following Implementation Phase diagram, are presented in detail in the subsequent sections of this Statement of Work document.



Figure 7: Implementation Phases

Phase 1 – Implementation Planning



The Implementation Planning tasks are performed for the purpose of verifying/establishing and documenting a clear purpose for the asset management system implementation. Functional and technical requirements that were published in the request for proposal are reviewed with Woolpert’s implementation team and the City’s management and technical team leads in order to align goals and expectations and to establish critical success factors as a means to measure implementation milestones.

Woolpert will facilitate a number of Pre-Planning discovery tasks comprised of a desktop audit of pertinent asset management data, followed by a series of on-site discovery workshops designed to identify, validate, and document levels-of-service and key asset management program metrics that we will need to configure the solution to support. In those instances where the City organization does not yet have well-defined performance metrics, the Woolpert implementation team will provide some examples of quality metrics that the City can start with and grow into as use of the system matures over time.

As part of these initial planning efforts, Woolpert will install a sample/configured asset management system solution either on-site, on the City’s servers, or in a cloud environment accessible to the City’s project team. This initial system install will be used through all of the implementation phases to “teach and train” users how to navigate the system and ultimately use it to their daily benefit. As the project moves through the phases, this initial install will be updated to reflect the configuration decisions made by the City’s project team until such time that at “Go-Live” it becomes the Production Environment.

**Key Implementation Planning
(Phase 1) Deliverables**

- Pre-Implementation Planning Discovery Technical Memorandum
- Installation and Configuration of an Asset Management Solution Sandbox Environment
- Asset Management Software Solution Demonstrations
- Business Process Workflow (Best Practices) Documentation

Additionally, as part of Woolpert’s continuous knowledge transfer and change control efforts, we provide a series of software demonstrations to the City team early in the process. This early introduction to the system imparts a level of understanding among those City team members that will be asked to make design and configuration decisions. This is the first of many software demonstrations that will be used throughout our implementation process.

The Planning Phase culminates with a series of Business Process Review workshops whereby Woolpert works with the City’s key technical staff to establish a best practices approach to managing the request, work order, and inspection data that will be captured, routed, acted-upon, and reported within the asset management software application.

Each of the related Implementation Planning Tasks and Sub-Tasks are detailed in the following sections.

Task 1.1: Conduct Pre-Planning Discovery

Woolpert’s Project Manager and Program Director will jointly facilitate a series of pre-planning discovery sub-tasks for the purposes of: 1) understanding the City’s over-arching corporate asset management objectives and strategies, 2) aligning the City’s stated technical and functional requirements with the governing project plan (Request for Proposal, contract, Statement of Work documents), and 3) identifying and documenting any critical performance requirements that have not been adequately addressed to date (critical/unique asset performance measures, system interfaces, unique workflow details, specific reporting requirements, and data conversion requirements).

Ultimately, we are utilizing this pre-planning discovery opportunity to engage the City’s management team and technical leads to define the target asset performance measures the implemented asset management system will be required to support. By clearly articulating the implementing organization’s implementation vision and aligning this with the corporate policies and goals, strategies, and objectives, we are able to establish the desired “to-be” position at the very on-set of the project. Woolpert will then compare requirements to the City’s current asset management strategy baseline to define the outstanding measures that need to be implemented as part of the overall project. This will clearly establish the “roadmap” our project team and the City’s project participants will utilize to navigate the design, configuration, and deployment phases of the project. **Figure 8: Performance Management Roadmap** illustrates how the pre-implementation planning discovery is used to align implementation goals and objectives and establish the requisite implementation road map.

Any program elements that are discovered during this process that are not part of the Project Plan will be presented to the City’s management team for consideration. At their discretion, the City’s management team may elect to: 1) have these added to a revised Project Plan for inclusion in the core project implementation; 2) wait to address these issues as part of the Phase 5 – Extended Support; or 3) place them in a “parking lot” for future consideration outside of the scope of this implementation plan. Depending upon the City’s decision, Woolpert will make any necessary adjustments to the Project Plan and obtain acceptance from the City.

Related sub-tasks are as follows:



Figure 8: Performance Management Roadmap



- Sub-Task 1.1.1: Prepare Request for Information
- Sub-Task 1.1.2: Submit RFI to City PM
- Sub-Task 1.1.3: City PM to Facilitate Data Gathering Process and Provide Data to Woolpert (City-Owned Task)
- Sub-Task 1.1.4: Woolpert to Perform Desktop Audit of Collected Information
- Sub-Task 1.1.5: Woolpert to Prepare for On-Site Discovery Workshops
- Sub-Task 1.1.6: Woolpert to Facilitate Pre-Planning Discovery Workshops (On-Site Task)
- Sub-Task 1.1.7: Woolpert to Document Workshop Findings and Update Implementation Scope of Services, Assumptions, and Risk Plan
- Sub-Task 1.1.8: Woolpert to Submit Updated Documentation to City PM
- Sub-Task 1.1.9: Woolpert to Facilitate Remote Review Meeting with City Technical Team

Deliverables

- Woolpert will prepare a Request for Information and submit it to the City PM.
- Woolpert will perform a desktop review of the data provided by the City PM.
- Woolpert's Project Manager and a Systems Analyst will facilitate a series of discovery workshops, on-site at the City's facilities, over the course of two (2) consecutive business days.
- Woolpert will document the workshop discussions and finding in the form of a Technical Memorandum and submit it to the City PM.
- Woolpert will facilitate a remote conference call meeting with the City team to review the contents of the Technical Memorandum.

Assumptions

- The City's project manager will provide the data gathered from the Request for Information no later than one (1) week prior to the scheduled pre-discovery workshops.
- All activities, other than the actual workshop will be performed remotely.
- The City's project manager will ensure site readiness and staff participation for the workshop.

City Responsibilities

- The City PM will facilitate the data gathering process to collect the information detailed in Woolpert's RFI.
- The City PM will secure appropriate meeting facilities in which Woolpert will conduct the workshops.
- The City PM will schedule all City workshop attendees.
- All identified City workshop attendees will actively participate in the on-site meetings without undue interruption.
- The City PM and technical project team members will review the Technical Memorandum and provide feedback to Woolpert in a timely fashion.
- The City PM and technical project team members will participate in a remote conference call review meeting with the Woolpert PM.

- The City's Project Manager will ensure IT Staff are available during the AM software installation and testing to ensure the proper access and permissions are granted.
- The City will create a login for Woolpert for the necessary access to install software, set up databases, and test the software.

City Responsibilities

- Create the logins for Woolpert with the necessary permissions.
- Ensure the Servers are prepared for the installation of the AM software including ArcGIS Server, SDE, RDBMS (SQL Server or Oracle), and other supporting software applications.
- City project manager to ensure the necessary staff participate in the training.

Task 1.3: Provide Asset Management (AM) Software Demonstrations

Once the initial AM software sandbox environment has been installed and configured, Woolpert will facilitate a series of on-site software demonstrations for the purpose of introducing the City's project team members to the core functionality and features of the AM software application(s). For many of the City's project team members, this will be their first exposure to the new AM software. These demonstrations will provide an initial overview of the features and functions of the new software and will serve as a basis of on-going software training and knowledge transfer that will increase in frequency and complexity as the project progresses through the subsequent design, configuration and deployment phases.

Shortly after completion of the on-site software demonstrations, a Woolpert Implementation Specialist will work with the City's identified AM System Administrator to establish Sandbox log-ins for each identified project team member so that they may log into the system at their leisure to further explore the AM software workflows and capabilities.

Related sub-tasks are as follows:

- Sub-Task 1.3.1: Woolpert to Prepare Software Demonstration Agenda
- Sub-Task 1.3.2: Woolpert to Submit Agenda to City PM
- **Sub-Task 1.3.3: City PM to Prepare Site for Software Demonstrations (City-Owned Task)**
- Sub-Task 1.3.4: Woolpert to Provide Software Demonstrations (On-Site Task)

Deliverables

- Woolpert will develop a Software Demonstration agenda and provide same to the City project manager.
- Woolpert will provide a Systems Analyst on-site to facilitate the Software Demonstrations.

Assumptions

- Software Demonstrations will be facilitated utilizing the newly installed on-premise AM software environment.
- The City's project manager will ensure site readiness and staff participation for the Software Demonstrations.
- The City's project manager will provide a conference room or training room with a projector. During the Software Demonstrations, individual computers are not needed for the participants. The software functionality will be demonstrated from the instructor's computer.
- The City's project manager will ensure Woolpert is provided access to the AM software environment installed on-premise.

City Responsibilities

- City project manager to review and accept agenda for Software Demonstrations.
- City project manager to schedule and accommodate the appropriate City project team members such that they are available, without undue interruption, for the required number of days.
- Secure an appropriate training facility suitable for participants.

Task 1.4: Conduct Business Process Reviews

The objective of the business process reviews is three-fold: 1) provide Woolpert's implementation team with a deep understanding of the City's desired work/asset management work flows/business processes, 2) provide City project participants with a deeper understanding of the impending business process improvements introduced by the planned AM software solution, and 3) establish asset life-cycle management and work management workflows in the context of the City's asset management strategies and as supported by the AM software's functional and technical capabilities.

One of the main features of today's leading asset and maintenance management software applications is their ability to be configured to fit the unique manner in which an organization manages and executes its infrastructure maintenance management activities. Over the course of many asset management system implementation engagements, Woolpert has learned that: 1) documenting asset management software workflows can be a rather overwhelming task for the City's technical leads; and 2) the service request, work order, and inspection life-cycles that need to be managed within the asset/maintenance management software application is 80 – 90 percent standard across all implementing organizations. Woolpert has taken this knowledge and developed a standard set of "best practice" workflow templates that we use to facilitate understanding of the work management life-cycle and we tailor these standard templates to best accommodate the implementing organization's standard "planning, scheduling, and execution" workflows. We have found that this approach saves time, money, and introduces a substantial level of best industry practices for work management activities right at the on-set of the project.

Woolpert will facilitate a series of on-site workshops that investigate a number of standard work management work flow diagrams detailing the life-cycle management of work requests within the AM software application. The eight (8) primary workflow areas addressed will include:

- | | | |
|---------------|----------------|---------------------------|
| 1. Initiation | 4. Scheduling | 7. Emergency Work |
| 2. Screening | 5. Assignment | 8. QA Review & Completion |
| 3. Planning | 6. Performance | |

Additionally, Woolpert will address the following three (3) ancillary work flows:

1. Asset Set-Up and Modification
2. Preventative Maintenance/Predictive Maintenance Work Order Set-Up and Modification
3. Inventory Management Processes

Along with the various workflows, Woolpert will introduce the use of Work Order Statuses, reasons why work order/inspection performance might be delayed (awaiting parts, awaiting available crews, weather delays, etc.), the ability to track and report on work orders throughout their life-cycle, and how all of these factors relate to establishing a work management environment that moves from reactive maintenance to a more proactive maintenance position (one of the multiple asset management best practices Woolpert facilitates through our implementations).

Also, as part of these workshop discussions, Woolpert will expand upon the discussions of Levels of Service, asset performance measures, and specialized reporting requirements to identify any key custom data fields that will need to be taken under consideration during the upcoming (Phase 2) configuration workshops.

Upon the completion of these workshops, Woolpert will compile all of the comments and feedback received from the City's technical team members (maintenance staff), and update the standard workflow diagrams to reflect local practices. Our past experiences with this exercise indicate that we should not need to make more than a few edits to our standard workflow diagrams. The resultant documentation will later be used by the City's technical team and system administrators to develop standard operating procedures and training materials.

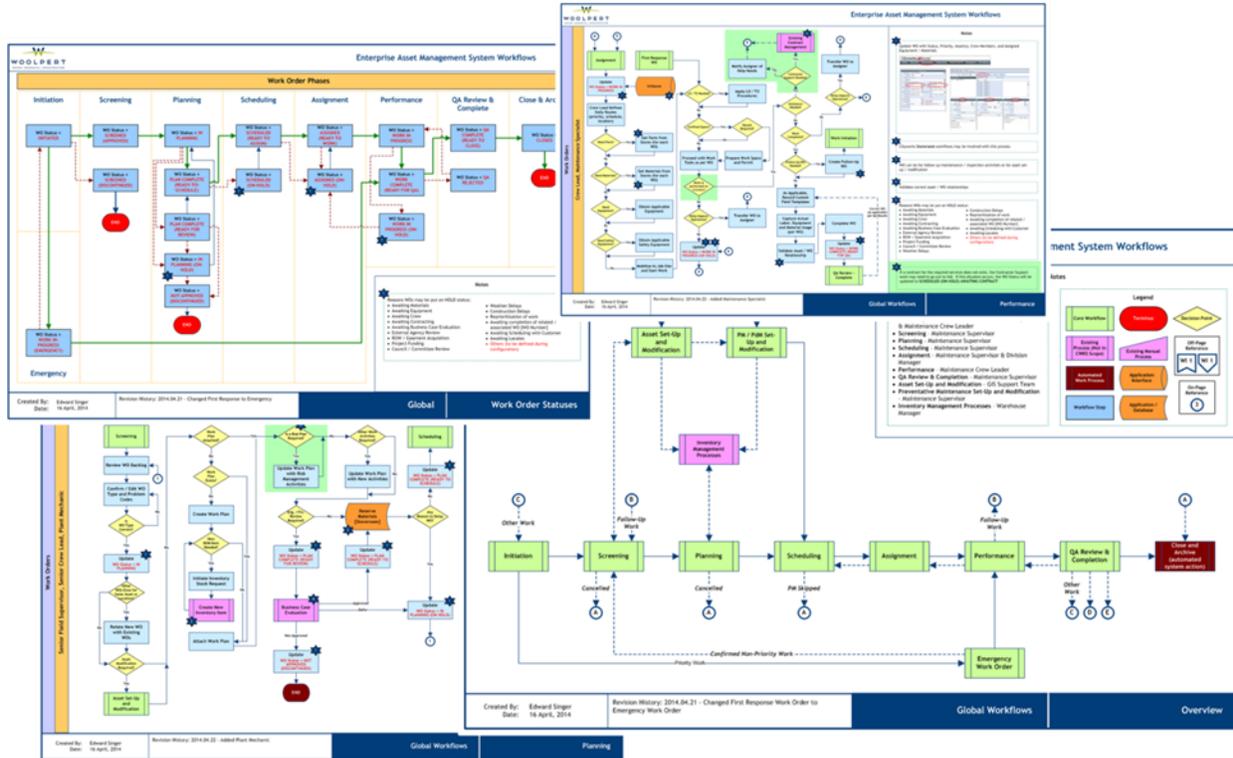


Figure 10: Example AM Software Workflow Diagrams

Related sub-tasks are as follows:

- Sub-Task 1.4.1.1: Woolpert to Prepare for Business Process Review Workshops (First Round)
- Sub-Task 1.4.1.2: Woolpert to Facilitate Business Process Review Workshops (Round 1)
- Sub-Task 1.4.1.3: Woolpert to Document Business Process Review Workshop Findings (First Round)
- Sub-Task 1.4.1.4: Woolpert to Submit Draft Workflow Documentation to City PM
- **Sub-Task 1.4.1.5: City Technical Team to Review Draft Workflow Documentation (City-Owned Task)**
- Sub-Task 1.4.1.6: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 1.4.1.7: Woolpert to Update Workflow Documentation per City Review Comments

Deliverables

- A Woolpert Senior System Analyst and a System Analyst will facilitate a series of initial on-site Business Process Review Workshops.
- A Woolpert Senior System Analyst will facilitate an on-site GIS database design workshop for up to one and a half (1.5) consecutive business days for the purpose of establishing the asset data modeling requirements for Lift Stations and Water Treatment Plants.
- Woolpert team members will document the outcomes of the first round of workshops.
- Woolpert team members will facilitate a remote review meeting up to two (2) hours in duration with the City technical team to review draft documentation and update the documentation based on the outcome of the review meeting.

Assumptions

- All activities, other than the actual workshops will be performed remotely.
- All workshop activities will be performed on-site.
- The City’s project manager will ensure site readiness and staff participation for the workshops.



City Responsibilities

- Secure an appropriate meeting facility suitable for participants.
- Schedule and accommodate the appropriate City project participants such that they are available, without undue interruption, for the required number of days.

Task 1.5: Geodatabase Design Review

To support the asset management software configuration and setup for the one Water Production Facility, Woolpert will work with the City to develop a geodatabase schema for the Facility. The Woolpert project manager and the Senior Systems Analyst will be on-site for one day to facilitate a workshop to support the design and creation of the geodatabase schema. Data will not be populated within the database, the population of assets and information will be completed by the City.

Related sub-tasks are as follows:

- Sub-Task 1.5.1: Woolpert to Prepare for On-Site Discovery Workshops
- Sub-Task 1.5.2: [Woolpert to Facilitate Geodatabase Design Review Workshops \(ON-SITE TASK\)](#)
- Sub-Task 1.5.3: Woolpert to Document Workshop Outcomes in the form of a Technical Memorandum
- Sub-Task 1.5.4: Woolpert to Submit Draft Technical Memorandum to CITY PM
- Sub-Task 1.5.5: [CITY Core Team to Review Geodatabase Design Technical Memorandum \(CITY TASK\)](#)
- Sub-Task 1.5.6: Woolpert to Facilitate Remote Review Meetings with CITY Core Team
- Sub-Task 1.5.7: Woolpert to Update Geodatabase Design Technical Memorandum per CITY Core Team Review Comments
- Sub-Task 1.5.8: Woolpert to Submit Updated Geodatabase Design Technical Memorandum to CITY PM

Deliverables

- A Woolpert Senior System Analyst and Project Manager will facilitate a one-day workshop to design the Water Production Facility geodatabase
- Woolpert team members will document the outcomes of the workshop.
- Woolpert team members will facilitate a remote review meeting up to two (2) hours in duration with the City technical team to review draft documentation and update the documentation based on the outcome of the review meeting.

Assumptions

- All activities, other than the actual workshops will be performed remotely.
- All workshop activities will be performed on-site.
- The City's project manager will ensure site readiness and staff participation for the workshops.

City Responsibilities

- Secure an appropriate meeting facility suitable for participants.
- Schedule and accommodate the appropriate City project participants such that they are available, without undue interruption, for the required number of days.

Task 1.6: Phase 1 Quality Control

Woolpert technical resources, not regularly involved with this implementation will perform independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Task 1.7: Phase Acceptance and Close

This is the Phase exit document that the City project manager signs indicating Woolpert has delivered the Phase 1 services in accordance with the Scope of Work and Project Plan. Phase 2 of this scope will not begin until Phase 1 has been approved by the City.

Phase 2 – Core System Design and Configuration



Using the “road map” developed in Phase 1 as our guide, the Woolpert implementation team will lead the City’s project team through the AM software configuration tasks. The end result of Phase 2 activities will be a fully configured AM solution – deployed to the City’s development environment – that is ready to undergo User Acceptance Testing.



Woolpert will initiate the configuration activities by developing a set of configuration documents. These will be reviewed by the City’s technical team for the purpose of gaining a level of familiarity with the various aspects of the system components that will need to be configured (service requests, work orders, inspections, job plans, work crews, default schedule dates, and the list goes on).

Woolpert will then facilitate series of implementation training courses whereby we will introduce, in greater detail, the AM software solution to the City’s selected implementation team members. These will be the division managers, maintenance supervisors, and crew leaders that will be expected to provide detailed and direct input into how the AM solution gets designed and configured. This training will prepare these team members to proactively participate in the configuration workshops and make informed decisions as to how their system gets deployed.

Following the configuration training, Woolpert’s implementation team will facilitate a series of on-site configuration workshops, whereby the AM software solution will be iteratively configured and loaded with the data required to support the City’s asset/maintenance workflows and support the defined reporting requirements. Along with the core system configuration, Woolpert will also facilitate configuration of any add-on modules such as CCTV and inventory management needed to render the core system fully functional.

Key Core System Design and Configuration (Phase 2) Deliverables

- Core AM System Configuration Documentation
- AM System Configuration Training
- Core AM System Configuration in the Development Environment
- Inventory and Materials Management Configuration in the Development Environment
- Core AM System Full-Scale Demonstrations

Once all of the configuration activities have been completed, Woolpert will facilitate a series of on-site system demonstrations. These demonstrations will “walk” the system through all of the asset/maintenance management workflows in the manner they were configured and provide the City’s technical team an opportunity to comment upon and request modifications to the configuration. After Woolpert updates the configuration (and related documentation) per the demonstration feedback, the system will be ready for User Acceptance Testing (UAT) – Phase 3.

Task 2.1: Prepare Configuration Documentation

Woolpert will compile the asset management program data gathered and documented through the multiple on-site workshops and other related project meetings completed project-to-date (pre-planning discovery) and distill this information into a series of organized configuration documents. This configuration documentation, consisting of standard AM system elements, as well as the customized details required to support the City’s specific asset management program, will be used to guide the configuration of the AM system such that it is localized to the City’s specific work order and asset maintenance management requirements.

Related sub-tasks are as follows:

- Sub-Task 2.1.1: Woolpert to Prepare Draft Configuration Documentation
- Sub-Task 2.1.2: Woolpert to Submit to City PM for Review
- Sub-Task 2.1.3: Woolpert to Facilitate Remote Review Meeting with City Technical Team

Deliverables

- Woolpert team members will develop a set of configuration documents as more fully detailed above.
- Woolpert will facilitate a remote review meeting up to two (2) hours in duration with the City’s technical team.

Assumptions

- All above listed tasks will be performed remotely.

City Responsibilities

- Review the prepared Draft Configuration documentation.
- Participate in the remote review meeting.

Task 2.2: Provide Asset Management System Configuration Training

Woolpert will facilitate a series of on-site configuration training courses for the purpose of providing the City’s project team members with the AM software knowledgebase needed to support the system design and implementation decisions. Configuration Training will be comprised of a two-day curriculum designed to cover all relative aspects of the AM system configuration. Completion of the configuration training will ensure the City’s project participants (those with implementation responsibilities) are provided with enough exposure to , and understanding of, the AM software work order and asset management functionality such that they are able to make smart and informed configuration decisions as they relate to the overall implementation objectives. The intent of the Configuration Training is not to provide the skills needed to maintain the daily operations of the system. This End-User Training is provided at a later date.

Configuration Training will be facilitated in a classroom environment (computer lab or training room) on-site at the City’s facilities.

Related sub-tasks are as follows:

- Sub-Task 2.2.1: Woolpert to Prepare Configuration Training Agenda
- Sub-Task 2.2.2: Woolpert to Submit Agenda to City PM
- **Sub-Task 2.2.3: City PM to Prepare Site for Configuration Training (City-Owned Task)**
- Sub-Task 2.2.4: Woolpert to Provide Configuration Training (On-Site Task)

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Figure 11: Sample AM System Configuration Documentation Table of Contents



Deliverables

- Woolpert will develop a Configuration Training agenda and provide same to the City project manager.
- Woolpert will provide a Systems Analyst on-site to provide the Configuration Training.

Assumptions

- Training will be facilitated utilizing the newly installed on-premise AM software environment.
- The City's project manager will ensure site readiness and staff participation for the training.
- The City's project manager will provide a conference room or training room with a projector. During Configuration Training, individual computers are not needed for the participants. The software functionality will be demonstrated from the instructor's computer.
- Ensure Woolpert access to the AM software environment installed on-premise to perform training.

City Responsibilities

- City project manager to review and accept agenda for training.
- City project manager to schedule and accommodate the appropriate City project team members such that they are available, without undue interruption, for the required number of days.
- Secure an appropriate training facility suitable for participants.

Task 2.3: Facilitate Core AM Software Configuration

Woolpert will facilitate the Core AM Software Configuration through a series of up to three (3) on-site configuration workshops. The first round of workshops will address:

- **Domains.** This is the security architecture that determines how employees, work orders and other asset maintenance management information can be shared across organizational boundaries.
- **Employee Hierarchy.** Determines security protocols for each user of the system as well as practical grouping of employees for assignments to work orders, inspections, and service requests (e.g. crews).
- **Work Orders.** Templates for each of the type of maintenance activities that will be performed on each asset in the system
- **Tasks.** Individual work items associated with a work order. For example, a repair sewer main work order might have tasks for establish traffic control, utility locate, excavate, etc.
- **Materials Hierarchy.** Organization and rules for items that are used to repair assets. Examples of materials are things such as pipes and meters.
- **Equipment Hierarchy.** Organization and rules for items that are utilized to complete a work order but are not consumed. Examples are items such as backhoes, vehicles, vacuum trucks, etc.
- **Service Requests.** Templates for requests for service. Many times maintenance activities are initiated starting with a service request whose purpose is to determine if a work is necessary or not.
- **Reporting.** Current or future expected reports will be discussed and designed.
- **Projects.** Projects to be managed within the AMS software.

Woolpert will update the System Configuration Document upon completion of the first round of configuration workshops. The extra planning steps that are taken during the initial phases of an implementation, such as this will reap tremendous rewards when the system goes into production. In support of the configuration workshops, Woolpert will have a full version of AM software available to help facilitate ideas and approaches to the configuration – this is also part of the overall iterative learning process.

At the end of the first round of workshops, there will be a set of action items for the City team members, such as compiling a list of employees, work crews, and contractors, as well as hard copies of work orders, reports, inspection forms, and other relevant data sets. Woolpert will prepare a detailed list of action items and submit them to the City project manager. At the end of first round of

configuration workshops, Woolpert expects to have gathered enough information to configure approximately 70% of the City's desired asset maintenance management functionality.

The second round of workshops will address proposed configuration approaches to service requests, work orders, and inspections identified in the initial workshops. During second round workshops, the City's actual configured data will be available for viewing within the AM System software. At the end of second round of workshops, Woolpert expects to have gathered enough information to configure approximately 85% to 100% of the City's Core AM System requirements.

In some instances, a third round of configuration workshops may be required to achieve 100% configuration. The need for a third round of configuration workshops will be determined by common agreement between the City project manager and Woolpert's project manager and will be impacted by such issues as the number of implementing departments/divisions, the complexity of the planned asset maintenance management business processes, and the efficiency of the City project team members participation in the first two rounds of configuration workshops.

Related sub-tasks are as follows:

- Sub-Task 2.3.1: Round 1 Configuration Workshops
 - Sub-Task 2.3.1.1: Woolpert to Prepare for Configuration Workshops (First Round)
 - [Sub-Task 2.3.1.2: Woolpert to Facilitate Configuration Workshops \(Round 1\) \(On-Site Task\)](#)
 - Sub-Task 2.3.1.3: Woolpert to Update Configuration Documentation (Round 1)
 - Sub-Task 2.3.1.4: Woolpert to Perform Configuration in Development Environment
 - Sub-Task 2.3.1.5: Woolpert to Facilitate Remote Configuration Review Meetings With City Technical Team
 - Sub-Task 2.3.1.5.1: Remote Review Meeting 1
 - Sub-Task 2.3.1.5.2: Remote Review Meeting 2
- Sub-Task 2.3.2: Round 2 Configuration Workshops
 - Sub-Task 2.3.2.1: Woolpert to Prepare for Configuration Workshops (Second Round)
 - [Sub-Task 2.3.2.2: Woolpert to Facilitate Configuration Workshops \(Round 2\) \(On-Site Task\)](#)
 - Sub-Task 2.3.2.3: Woolpert to Update Configuration Documentation (Round 2)
 - Sub-Task 2.3.2.4: Woolpert to Perform Configuration in Development Environment
 - Sub-Task 2.3.2.5: Woolpert to Facilitate Remote Configuration Review Meetings With City Technical Team
 - Sub-Task 2.3.2.5.1: Remote Review Meeting 1
- Sub-Task 2.3.3: Round 3 Configuration Workshops **[IF REQUIRED]**
 - Sub-Task 2.3.3.1: Woolpert to Prepare for Configuration Workshops (Second Round)
 - [Sub-Task 2.3.3.2: Woolpert to Facilitate Configuration Workshops \(Round 2\) \(On-Site Task\)](#)
 - Sub-Task 2.3.3.3: Woolpert to Update Configuration Documentation (Round 2)
 - Sub-Task 2.3.3.4: Woolpert to Perform Configuration in Development Environment

- Sub-Task 2.3.3.5: Woolpert to Facilitate Remote Configuration Review Meetings With City Technical Team
 - Sub-Task 2.3.3.5.1: Remote Review Meeting 1
- **Sub-Task 2.3.4: Populate Treatment Plant Assets in GIS Database (City-Owned Task)**

Deliverables

- A Woolpert Senior System Analyst and System Analyst will facilitate Round 1 On-Site Configuration Workshops.
- Woolpert will update the configuration documentation based on the outcome of the first round of configuration workshops.
- Woolpert staff will perform system configuration in the City's on-premise development environment via remote access.
- Woolpert will facilitate two (2) remote in-process configuration review meetings, each up to two (2) hours in duration, with the City's technical team.
- A Woolpert Senior System Analyst and System Analyst will facilitate Round 2 On-Site Configuration Workshops
- Woolpert will update the configuration documentation based on the outcome of the second round of configuration workshops.
- Woolpert staff will perform system configuration in the City's on-premise development environment via remote access.
- Woolpert will facilitate one (1) remote in-process configuration review meeting with the City's technical team.
- Woolpert will facilitate a remote review meeting up to two (2) hours in duration with the City's technical team.
- **[IF REQUIRED]** A Woolpert Senior System Analyst and System Analyst will facilitate Round 3 On-Site Configuration Workshops
- Woolpert will update the configuration documentation based on the outcome of the second round of configuration workshops.
- Woolpert staff will perform system configuration in the City's on-premise development environment via remote access.
- Woolpert will facilitate one (1) remote in-process configuration review meeting with the City's technical team.
- Woolpert will facilitate a remote review meeting up to two (2) hours in duration with the City's technical team.

Assumptions

- All workshop preparation activities will be performed remotely.
- Actual workshops will be administered on-site at City facilities.
- City staff participating in the Configuration workshops will do so un-interrupted.

City Responsibilities

- Secure an appropriate workshop facility.
- Coordinate and schedule workshop participants.
- Workshop participants shall actively participate in workshop activities.
- Populate the updated GIS database with the Lift Station and Water Treatment Plant asset inventory.

Task 2.4: Facilitate Inventory and Materials Management Configuration

Materials management and inventory control procedures play a significant role in properly deployed asset maintenance management solutions. As materials are added to work orders, they need to be depleted from the stock and the cost of the materials added to the work orders; as materials are depleted from stock, they need to be requisitioned from the various vendors. This task is focused on configuring the materials management module of the AM software to achieve these objectives. The effort required to integrate the AM software with the City's purchasing and inventory system of record is addressed in the Systems Integration tasks.

To accomplish these goals, Woolpert will facilitate a series of Inventory and Materials Management Configuration Workshops and then perform the resulting configuration in the AM software.

Related sub-tasks are as follows:

- Sub-Task 2.4.1: Round 1 Configuration
 - Sub-Task 2.4.1.1: Woolpert to Prepare for Configuration Workshops (First Round)
 - [Sub-Task 2.4.1.2: Woolpert to Facilitate Configuration Workshops \(Round 1\)](#)
 - Sub-Task 2.4.1.3: Woolpert to Update Configuration Documentation (Round 1)
 - Sub-Task 2.4.1.4: Woolpert to Perform Configuration in Development Environment
 - Sub-Task 2.4.1.5: Woolpert to Facilitate Remote Configuration Review Meetings With City Technical Team
 - Sub-Task 2.4.1.5.1: Remote Review Meeting 1
 - Sub-Task 2.4.1.5.2: Remote Review Meeting 2
- Sub-Task 2.4.2: Round 2 Configuration **[IF REQUIRED]**
 - Sub-Task 2.4.2.1: Woolpert to Prepare for Configuration Workshops (Second Round)
 - [Sub-Task 2.4.2.2: Woolpert to Facilitate Configuration Workshops \(Round 2\)](#)
 - Sub-Task 2.4.2.3: Woolpert to Update Configuration Documentation (Round 2)
 - Sub-Task 2.4.2.4: Woolpert to Perform Configuration in Development Environment
 - Sub-Task 2.4.2.5: Woolpert to Facilitate Remote Configuration Review Meetings With City Technical Team
 - Sub-Task 2.4.2.5.1: Remote Review Meeting 1
- Sub-Task 2.4.3: Woolpert to Perform Final Configuration Updates in Development Environment

Deliverables

- A Woolpert Senior System Analyst will facilitate Round 1 On-Site Configuration Workshops as follows:
- Woolpert will update the configuration documentation based on the outcome of the first round of configuration workshops.
- Woolpert staff will perform system configuration in the City's on-premise development environment via remote access.
- Woolpert will facilitate two (2) remote in-process configuration review meetings, each up to two (2) hours in duration, with the City's technical team.
- **[IF REQUIRED]** A Woolpert Senior System Analyst will facilitate Round 2 On-Site Configuration Workshops as follows:
- Woolpert will update the configuration documentation based on the outcome of the second round of configuration workshops.
- Woolpert staff will perform system configuration in the City's on-premise development environment via remote access.
- Woolpert will facilitate one (1) remote in-process configuration review meeting.
- Woolpert will facilitate a remote review meeting up to two (2) hours in duration with the City's technical team.
- Woolpert staff will perform final configuration updates in the City's on-premise development environment via remote access.

Assumptions

- All workshop preparation activities will be performed remotely.
- Actual workshops will be administered on-site at City facilities.
- City staff participating in the Configuration workshops will do so un-interrupted.

City Responsibilities

- Secure an appropriate workshop facility.
- Coordinate and schedule workshop participants.
- Workshop participants shall actively participate in workshop activities.

Task 2.5: Review and Approval of Updated System Configuration and Documentation

Woolpert will submit the updated Configuration Documentation to the City for review. The City's project manager and technical team members will undertake an internal review of this documentation, providing pertinent feedback to Woolpert. Upon completion of this task, Woolpert will have delivered a comprehensive set of configuration documents, updated to reflect the current as-is core system configuration. There will be additional opportunities to update this documentation in future project phases up to and including the final/accepted configuration documents delivered just prior to Go-Live.

Related sub-tasks are as follows:

- Sub-Task 2.5.1: Woolpert to Submit Updated Configuration Documentation to City PM
- **Sub-Task 2.5.2: City Technical Team to Review Updated Configuration and Documentation (City-Owned Task)**
- Sub-Task 2.5.3: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 2.5.4: Woolpert to Update Configuration Documentation per City Technical Team Review Comments
- Sub-Task 2.5.5: Woolpert to Submit Updated Pre-Final Configuration Documentation to City PM

Deliverables

- Woolpert will submit updated configuration documentation to the City project manager.
- Woolpert will facilitate a remote configuration documentation review meeting, up to four (4) hours in duration, with the City's technical team.
- Woolpert will update the configuration documentation based on the outcome of the City review and re-submit the updated documentation to the City project manager.

Assumptions

- The City project manager will ensure that the necessary people review and understand the documentation for its accuracy.

City Responsibilities

- The City project manager and technical team will review and provide feedback on the configuration document.
- The City project manager and technical team will participate in a remote configuration document review meeting.
- The City project manager will approve and sign the configuration document.

Task 2.6: Provide AM Software Demonstrations

After completion of the core AM software configuration, and Inventory and Materials Management configuration, and approval of the updated configuration documentation, Woolpert will provide a full on-site AM software demonstration to City project participants and stakeholders. At the end of these meetings, it is anticipated that there may be some minor requested changes to the system configuration. Woolpert will make those configuration updates to the AM software environment and update the configuration documentation, as required.

Related sub-tasks are as follows:

- Sub-Task 2.6.1: Woolpert to Prepare for On-Site Software Demonstrations
- **Sub-Task 2.6.2: Woolpert to Facilitate On-Site Software Demonstrations (On-Site Task)**
- Sub-Task 2.6.3: Woolpert to update AM software configuration based on feedback obtained during software demonstrations

Deliverables

- Woolpert will provide on-site AM System solution demonstrations.

- Woolpert will update the AM software configuration in the City’s on-premise development environment, per the demonstration feedback, via remote access.

Assumptions

- All demonstration preparation activities will be performed remotely.
- City staff participating in the demonstrations will do so un-interrupted.

City Responsibilities

- Secure an appropriate workshop facility.
- Coordinate and schedule demonstration participants.

Task 2.7: Phase 2 Quality Control

Woolpert technical resources, not regularly involved with this implementation will perform independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Task 2.8: Phase Acceptance and Close

This is the Phase exit document that the City project manager signs indicating Woolpert has delivered the Phase 2 services in accordance with the Scope of Work and Project Plan. Phase 3 of this scope will not begin until Phase 2 has been approved by the City.

Phase 3 – Core System Deployment



Once the Core AM system has been configured, there are still a number of critical tasks that must be completed before the solution is placed into a production environment. Woolpert’s implementation team will lead the City’s technical team through a series of related deployment tasks that will ensure a fully tested and accepted solution as well as a City team of fully trained system administrators and end users ready to put the system to use on a daily basis.



Woolpert will assist the City system administrators in developing a thorough Testing and Acceptance Plan, designed to step the configured solution through all of the technical and functional requirements that the system was configured to support. Following acceptance of the test plan, Woolpert will facilitate a series of Tester Training classes for the City’s selected testing team. Immediately upon completion of this training, the City’s testing team will execute the User Acceptance Testing program in accordance with the plan. While it is the City’s responsibility to assemble a testing team and manage the testing procedures in-house, Woolpert staff will be made available to provide remote assistance.

Once the system testing has been completed, and all of the resultant configuration updates have been made, Woolpert will then deliver the required end-user training. This training will be scheduled and delivered “just in time”, immediately prior to the Go-Live

activities to ensure system administrators and end users are prepared to adopt and embrace the new technology solutions right out of the gate. Depending upon the number of different divisions and the number of system users, the training classes may be staggered to support a staggered Go-Live schedule – our objective here is to not overwhelm the City team with too much change too quickly.

Key Core System Deployment (Phase 3) Deliverables

- User Acceptance and Testing (UAT) Plan
- Tester Training
- UAT Support
- End-User Training
- Go-Live Support

The final deployment task is for Woolpert to assist the City system administrators in migrating the solution from the Development/Testing environment to a live Production environment and provide on-site Go-Live support for the first several days (to a week) that the new system is being placed into productive use.

Task 3.1: Develop Test Plan

The focus of system testing efforts is to thoroughly test the newly installed/configured AM System solution and ensure all delivered functionality (application workflows, templates, reports, interfaces) are properly functioning.

The focus of system testing efforts is to thoroughly test the newly

Woolpert will take the lead on developing a Testing and Acceptance Plan. The Plan will derive its focus from the previously prepared AM System Configuration documents. Functional metrics that the AM System configuration must successfully achieve prior to being promoted to the City’s production environment will be defined. Additionally, test scenarios designed to step City Testers through the User Acceptance Testing (UAT) process will be developed as part of this plan. Final plan contents will be per common agreement between the City testing team and Woolpert and will serve as the “script” for testing and approving the system configuration. The test plan will address the AM System functionality specified and configured per the Project Plan.

Related sub-tasks are as follows:

- Sub-Task 3.1.1: Woolpert to Develop Draft User Acceptance Test (UAT) Plan
- Sub-Task 3.1.2: Woolpert to Submit Draft UAT Plan to City PM
- **Sub-Task 3.1.3: City Technical Team to Review Draft UAT Plan (City-Owned Task)**
- Sub-Task 3.1.4: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 3.1.5: Woolpert to Update Draft UAT Plan per City Comments
- Sub-Task 3.1.6: Woolpert to Submit Updated UAT Plan to City PM

Deliverables

- Woolpert will prepare and deliver the draft Testing and Acceptance Plan to the City project manager.
- Woolpert will facilitate a remote review meeting, up to two (2) hours in duration, with the City testing team.
- Woolpert will update the testing and Acceptance Plan per the results of the review meeting and re-submit to the City project manager.

Assumptions

- The Testing and Acceptance Plan will be developed per common agreement between the City and Woolpert.

City Responsibilities

- The City’s project manager and members of the testing team must thoroughly review and understand the Testing and Acceptance Plan.

Task 3.2: Provide Tester Training

It will be the responsibility of the City to select a number of end-users who will provide testing of the newly configured AM System. In order to effectively test the system in accordance with the UAT Plan, training will be provided to these end-users. The training will include the following:

- Training Course 1 – System Administration..... 2 hours
- Training Course 2 – Work Management..... 4 hours
- Training Course 3 – Inventory and Materials Management 2 hours

Related sub-tasks are as follows:

- Sub-Task 3.2.1: Woolpert to Prepare Training Materials
- **Sub-Task 3.2.2: City PM to Prepare City Site for Training (City-Owned Task)**
- Sub-Task 3.2.3: Woolpert to Provide On-Site Training (On-Site Task)

Deliverables

- Woolpert’s Project Manager will deliver the necessary training materials to the City’s project manager. Preparation and delivery of training materials shall be within two (2) business days prior to the scheduled start of on-site training activities.
- Woolpert project team members will prepare and deliver training as detailed above.

Assumptions

- The City understands that failure to provide the City testing team with the appropriate training documents will impact Woolpert’s ability to properly train these users in the time allotted for classroom training.
- The City understands that failure to properly prepare the training site and ensuring adequate available training resources will result in the Woolpert – City training team being unable to provide the required training to the City testers.
- The City understands that failure to properly prepare for and participate in the training sessions will significantly impact the City testing team’s ability to effectively make use of the configured AM System application.

City Responsibilities

- Distribute training materials to the City testing team prior to the scheduled training sessions.
- Ensure training room is prepared in advance.
- The City’s project manager and testing team must thoroughly review and understand the training syllabus developed by Woolpert.
- Secure an appropriate training facility suitable for participants.



- Schedule and accommodate the appropriate City testing team members such that they are available, without undue interruption, for the required number of days.

Task 3.3: User Acceptance Testing in Development Environment

Once the UAT Plan has been approved by all parties and tester training has been delivered, the City testing team will undertake the UAT activities defined within the plan – and only those activities defined within the UAT Plan. Woolpert will provide one day of on-site support during City-owned testing activities. Additionally, upon the completed testing, and at specific in-testing milestones defined within the plan, Woolpert will make the required configuration updates/modifications/corrections to achieve testing acceptance.

City testers will “step” the AM System configurations through the test scripts defined within the Testing & Acceptance Plan. The test scenarios will be marked as either “pass” or “fail” with appropriate notes and screen shots provided to Woolpert for resolution. Testing and related configuration updates will continue until acceptable performance is achieved as defined within the UAT Plan. During testing, a regular scheduled phone meeting will be held to review issues and resolutions.

Related sub-tasks are as follows:

- **Sub-Task 3.3.1: City Testing Team to Perform User Acceptance Testing (City-Owned Task)**
- **Sub-Task 3.3.2: Woolpert to Provide one (1) day on on-site Testing Support (On-Site Task)**
- Sub-Task 3.3.3: Woolpert to Update AMS and Related Application Configurations per Testing Results
 - Sub-Task 3.3.3.1: AM System Configuration
 - Sub-Task 3.3.3.2: Custom Application Interfaces Configuration
 - Sub-Task 3.3.3.3: Configuration Documentation

Deliverables

- Woolpert will provide one (1) day on on-site testing support services.
- Woolpert will update the AM System configuration based on UAT results.
- Woolpert will update the configuration documentation based on UAT results and updated configurations.

Assumptions

- City UAT efforts will remain focused on the scripts and criteria defined in the UAT Plan.

City Responsibilities

- Set-up and administer adequate testing facilities.
- Manage the testing process.
- Coordinate and schedule testing participants.
- Testing participants shall actively participate in testing activities.

Task 3.4: Provide End-User Training

Completion of the training efforts will result in City system administrators and end-users being provided the system knowledge and capabilities necessary to manage (administrators) and use (end-users) the configured AM System and integrated applications in an effective manner such that the City’s over-arching business objectives can be met through use of the newly configured system.

Given the small number of end-users, Woolpert’s typical train-the-trainer approach, where Woolpert personnel fully train the core City team and then the core City team trains the remaining end-users, does not result in significant savings for this project. We recommend that Woolpert team members be involved in all of the end-user training classes either as lead instructors or facilitators to City instructors. Additionally, given the small number of power users, Woolpert recommends not repeating the System Administrator class trained prior during the Tester Training. Each class will be delivered on-site at the City’s identified training facility. Prior to the training, Woolpert will prepare a training syllabus detailing each topic to be covered.

Classes are designed to accommodate the training of up to ten (10) trainees with a single Woolpert resource. Classes where a trained City instructor leads the course and a Woolpert team member supports the instructor can accommodate up to twenty (20) trainees.

Woolpert will provide the full suite of AM System (and related applications) training to the City's identified core team members and identified power users. Immediately following this training, Woolpert will lead the first round of end-user training sessions (teaching the same material the City core team members and power users just learned) with support being provided by the newly trained City staff. Given the small number of users, no additional training classes are required. Should additional training courses be required, the City core team members and power users will deliver this end-user training.

While this formalized end-user training occurs just prior to go-live, City system administrators will have already participated in the following training during prior project phases:

- Software installation and configuration training (knowledge transfer).
- Multiple software demonstrations.
- Asset Management System Configuration training (system exposure prior to configuration workshops).
- Multiple System Configuration workshops (in which the software is used extensively).
- Tester training.

Related sub-tasks are as follows:

- Sub-Task 3.4.1: Woolpert to Prepare Training Materials
- Sub-Task 3.4.2: City PM to Prepare City Site for Training (City-Owned Task)
- Sub-Task 3.4.3: Woolpert to Provide On-Site Trainer Training
 - Sub-Task 3.4.3.1: EUT Class 1 – All IT / GIS / CWKS Administrator Training (On-Site Task)
 - Sub-Task 3.4.3.2: EUT Class 2 – Water Distribution & Sewer Collection Training (On-Site Task)
 - Sub-Task 3.4.2.3: EUT Class 3 – Water Production Training (On-site Task)

Deliverables

- Preparation of training materials.
- A Woolpert Senior Systems Analyst will be on-site to provide four (4) days of End-User Training.
- Class sizes will be limited to no more than ten (10) if a single instructor is conducting the class with no assistance; class sizes can increase to up to twenty (20) if a properly trained resource, City or Woolpert, assists the lead instructor.

Assumptions

- The City has an adequate training facility that can accommodate the resultant number of staff to be trained; each accessing the AM system on their own workstation.

City Responsibilities

- Secure an appropriate training facility.
- Coordinate and schedule training participants.
- Training participants shall actively participate in training activities.

Task 3.5: Provide Go-Live Support

Immediately following the AM System Training, Woolpert will provide on-site System Go-Live support in order to assist with the successful start-up of the AM System. During this time, Woolpert's Senior Systems Analyst will assist the City's end-users and system administrators with site-specific configuration issues. Additional coaching and supplemental training services will also be provided during this time.

In preparation for go-live, Woolpert's Senior Systems Analyst will work on-site with the City's project manager and IT support staff to ensure that all terminals requiring access to the AM System application(s) are tested for connectivity; all terminals requiring the ability to print documents are tested for connectivity; and all system user accounts are tested for login ability. Additionally, as part of the go-live preparation activities, Woolpert's Senior Systems Analyst will migrate the configured and approved AM System database from the Development environment to the Production environment.

Related sub-tasks are as follows:

- [Sub-Task 3.5.1: Woolpert to Migrate AMS Applications and Databases to Production Environment \(On-Site Task\)](#)
- [Sub-Task 3.5.2: Woolpert to Perform Data Load to Production Environment AMS Database \(On-Site Task\)](#)
- [Sub-Task 3.5.3: Woolpert to Provide Four Days of On-Site Go-Live Support \(On-Site Task\)](#)

Deliverables

- Woolpert will migrate all applications and databases from Development to Production environment.
- A Woolpert Senior Systems Analyst will be provided on site for up to forty (40) hours each to support system go-live activities.

Assumptions

- The City's project manager will provide project sign-off within agreed upon timeframe following Go-Live.

City Responsibilities

- The City's project manager and IT support staff should equally assist in administering the Go-Live tasks to make sure it is clear to the End-Users that the City is internally capable of supporting the newly deployed AM System solution. The City system administrators and IT support staff will benefit from learning basic AM System troubleshooting routines during this time.

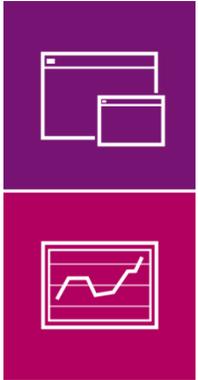
Task 3.6: Phase 3 Quality Control

Woolpert technical resources, not regularly involved with this implementation will perform independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Task 3.7: Phase Acceptance and Close

This is the Phase exit document that the City project manager signs indicating Woolpert has delivered the Phase 3 services in accordance with the Scope of Work and Project Plan.

Phase 4 – Advanced AMS Functionality Development & Configuration



While Phases 1 – 3 are focused on deploying the Core AM System functionality that supports work/asset maintenance management activities, Phase 4 tasks are undertaken to deliver the advanced AM system functionality required to deliver robust Enterprise Asset Management capabilities. Completion of Phase 4 tasks will result in the development and enterprise level application and workflow integrations between various corporate business applications and the Core AM software application. Phase 4 tasks will also include the development of custom reports and dashboards.

Key Advanced AMS Functionality Development and Configuration (Phase 4) Deliverables

- Custom Reports and Dashboards

Custom reports and dashboard requirements will be defined and refined through the process of implementing the Core solution (Phases 1 – 3). Woolpert will build out the specifications based on information previously gathered and configure the Core AM software as required, as well as writing any additional identified custom reports in one or more report writing solutions (Crystal Reports, SQL Server Reporting Services, etc.).

When all of the above tasks are completed and the advanced functionality has been tested and deployed to the Production environment, the City's asset management team will have all of the business process workflows needed to support asset management and begin to move the organization to a position of proactive asset sustainability.

Task 4.1: Develop Custom Reports and Dashboards

Key Custom Reports and Dashboards (Task 4.3) Deliverables

- Configured Functionality for Extended Reporting Capabilities
- Custom Configured User Dashboards

Woolpert will catalogue all of the necessary reports learned throughout document discovery, work-shops, and other various project meetings. Once the reports have been prioritized, Woolpert's implementation/report development team will subsequently deploy as many of the identified reports as possible within the allocated budget. Woolpert will utilize the City's desired software (Crystal Reports, Sequel Server Reporting Services, Oracle Reports Services, other) to configure and deploy the resultant reports. The reports will be reviewed with City staff through a series of in-process development reviews. Woolpert will incorporate requested changes into the reports. The reports will be tested as part of the overall User Acceptance Testing efforts.

Related sub-tasks are as follows:

- **Sub-Task 4.3.1: City to Provide Woolpert a Prioritized List of Reports (City-Owned Task)**
- Sub-Task 4.3.2: Woolpert to Review Reports Provided by City
- Sub-Task 4.3.3: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 4.3.4: Woolpert to Develop Custom Reports
- Sub-Task 4.3.5: Woolpert to Facilitate In-Process Review Meetings with City Technical Team
 - Sub-Task 4.3.5.1: In-Process Report Development Review Meeting #1
 - Sub-Task 4.3.5.2: In-Process Report Development Review Meeting #2
 - Sub-Task 4.3.5.3: In-Process Report Development Review Meeting #3
- Sub-Task 4.3.6: Configure and Test Reports in Development Environment
- Sub-Task 4.3.7: Update Reports Based on Feedback from Review Meetings

Deliverables

- Woolpert will develop as many custom reports as can be achieved within the allocated budget of forty (40) man-hours (inclusive

of discovery, development, and review).

- Woolpert will facilitate up to three in-process review meetings, each up to one (1) hour in duration, over the course of report development.

Assumptions

- Some reports may not be able to be developed until all of the system integrations have been fully tested and deployed to the Development environment.

City Responsibilities

- Provide a prioritized list of reports or development consideration.
- Participate in the remote in-process review meetings.

Task 4.2: Phase 4 Quality Control

Woolpert technical resources, not regularly involved with this implementation will perform independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Task 4.3: Phase Acceptance and Close

This is the Phase 4 exit document that the City signs indicating Woolpert has delivered the Phase 4 services in accordance with the Scope of Work. After the phase 4 has been approved by the City, Woolpert will provide a project close document for signature by the City, signifying that all items listed within this scope of work have been completed.

Phase 5 – Extended Support (OPTIONAL-FEES NOT INCLUDED)



As the Asset Management System is leveraged to support daily maintenance management and asset sustainability objectives, the system end-users will undoubtedly identify additional system modifications and enhancements they would like to see implemented into the configuration. Users will identify workflow enhancements, additional user-defined custom fields to capture additional data, modifications to in-boxes and dashboards, new and modified custom reports, and even perhaps additional system integrations. Some of these elements may have been already identified as “nice to have” during the core system implementation, but were not made part of the scope at that time – we refer to this as “being placed in the parking lot for future consideration.”



In addition to these new elements of the system, there may also be the need to have Woolpert provide additional ad-hoc administrator support, end-user coaching/training, software version updates, and so forth. Woolpert will provide this level of Extended Support in accordance with the following scope items:



Task 5.1: Extended Review and Modifications (OPTIONAL-FEES NOT INCLUDED)

Woolpert will facilitate a series of extended system configuration reviews and modifications. The intent of these extended reviews/modifications is to give the City’s system users and administrators an opportunity to monitor and assess system usage and efficiencies over an extended period of time post Go-Live. During these extended review periods, the City will likely identify configuration modifications that are desired to support new or modified business objectives. Woolpert will facilitate up to three (3) review/modification milestones – one at forty five (45) days, one at ninety (90) days, and one at one hundred eighty (180) days as specified in the following sections:



Sub-Task 5.1.1: 45 Day Review and Modifications

Woolpert will facilitate a Forty Five (45) Day Review and Modification meeting, up to six (6) hours in duration, with the City technical team for the purpose of reviewing the AM system implementation and usage since Go-Live and determining any desired system modifications. This meeting will be facilitated by Woolpert’s project manager and a senior systems analyst, on site at the City’s facilities. Woolpert will document all of the meeting discussion points and decisions and use this information to generate a 45-Day Modifications Plan. This Technical Memorandum will prioritize the desired modifications/enhancements by user group. Woolpert will submit this document to the City’s project manager and facilitate a remote review meeting with the City’s technical team.

Once all of the enhancements and prioritizations are agreed upon, Woolpert will commence in fulfilling the enhancement/modification requests that can be achieved in a sixty (60) man-hour period. Any modifications not able to be completed within the allocated number of hours will be shelved to be re-addressed during the Ninety (90) Day Review and Modifications sub-task.

Related sub-tasks are as follows:

- **Sub-Task 5.1.1.1: City to Establish a Listing of Desired System Modifications (City-Owned Task)**
- **Sub-Task 5.1.1.2: Woolpert to Facilitate an On-Site Modifications Review Meeting with City Technical Team (On-Site Task)**
- Sub-Task 5.1.1.3: Woolpert to Prepare Draft 45 Day Modifications Technical Memorandum
- Sub-Task 5.1.1.4: Woolpert to Submit Technical Memorandum to City PM
- Sub-Task 5.1.1.5: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 5.1.1.6: Woolpert to Update Technical Memorandum per Review Meeting Results
- Sub-Task 5.1.1.7: Woolpert to Facilitate Agreed-Upon AM System Modifications

Deliverables

- Woolpert's Project Manager or Senior Systems Analyst will facilitate an on-site Modifications Review Meeting up to six (6) hours in duration with the City's technical team.
- Woolpert will generate a 45-Day Modification Plan, as more fully detailed above.
- Woolpert's Project Manager or Senior Systems Analyst will facilitate a remote 45-Day Modification Plan review meeting up to two (2) hours in duration with the City's technical team.
- Woolpert's implementation team will deliver up to a total of sixty (60) hours of system design, configuration, testing, and deployment services to achieve the goals of the 45-Day Modification Plan.

Assumptions

- The City's project manager will compile a listing of desired system configuration modifications/enhancements and provide same to Woolpert no later than one (1) week prior to the scheduled on-site review meeting.
- All system design, configuration, testing, training and deployment tasks are scoped to be performed remotely.
- Any work that the City determines needs to be performed on-site, instead of remotely, will need to be fit within the allocated budget, or the budget will need to be adjusted accordingly.
- The City's project manager will ensure site readiness and staff participation for the on-site review meeting, as well as the remote Plan review meeting.

City Responsibilities

- The City's project manager will facilitate the data gathering process to collect the details describing the technical team's desired modifications/enhancements.
- The City project manager will secure an appropriate meeting facility in which Woolpert will conduct the on-site review meeting.
- The City project manager will schedule all meeting attendees.
- All meeting attendees will actively participate in the on-site modification/enhancement review meeting without undue interruption.
- The City project manager and technical team members will review the 45-Day Modifications Plan and prepare comments.
- The City project manager and technical team members will participate in a remote conference call review meeting with the Woolpert project manager or senior systems analyst.

Sub-Task 5.1.2: 90 Day Review and Modifications

Woolpert will facilitate a Ninety (90) Day Review and Modification meeting, up to six (6) hours in duration, with the City technical team for the purpose of reviewing the AM system implementation and usage since Go-Live and determining any desired system modifications. This meeting will be facilitated by Woolpert's project manager and a senior systems analyst, on site at the City's facilities. Woolpert will document all of the meeting discussion points and decisions and use this information to generate a 45 Day Modifications Plan. This Technical Memorandum will prioritize the desired modifications/enhancements by user group. Woolpert will submit this document to the City's project manager and facilitate a remote review meeting with the City's technical team.

Once all of the enhancements and prioritizations are agreed upon, Woolpert will commence in fulfilling the enhancement/modification requests that can be achieved in a forty (40) man-hour period. Any modifications not able to be completed within the allocated number of hours will be shelved to be re-addressed during the One Hundred Eighty (180) Day Review and Modifications sub-task.

Related sub-tasks are as follows:

- **Sub-Task 5.1.2.1: City to Establish a Listing of Desired System Modifications (City-Owned Task)**
- **Sub-Task 5.1.2.2: Woolpert to Facilitate an On-Site Modifications Review Meeting with City Technical Team (On-Site Task)**
- **Sub-Task 5.1.2.3: Woolpert to Prepare Draft 90 Day Modifications Technical Memorandum**

- Sub-Task 5.1.2.4: Woolpert to Submit Technical Memorandum to City PM
- Sub-Task 5.1.2.5: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 5.1.2.6: Woolpert to Update Technical Memorandum per Review Meeting Results
- Sub-Task 5.1.2.7: Woolpert to Facilitate Agreed-Upon AM System Modifications

Deliverables

- Woolpert's Project Manager or Senior Systems Analyst will facilitate an on-site Modifications Review Meeting up to six (6) hours in duration with the City's technical team.
- Woolpert will generate a 90-Day Modification Plan, as more fully detailed above.
- Woolpert's Project Manager or Senior Systems Analyst will facilitate a remote 90-Day Modification Plan review meeting up to two (2) hours in duration with the City's technical team.
- Woolpert's implementation team will deliver up to a total of forty (40) hours of system design, configuration, testing, and deployment services to achieve the goals of the 90-Day Modification Plan.

Assumptions

- The City's project manager will compile a listing of desired system configuration modifications/enhancements and provide same to Woolpert no later than one (1) week prior to the scheduled on-site review meeting.
- All system design, configuration, testing, training and deployment tasks are scoped to be performed remotely
- Any work that the City determines needs to be performed on-site, instead of remotely, will need to be fit within the allocated budget, or the budget will need to be adjusted accordingly.
- The City's project manager will ensure site readiness and staff participation for the on-site review meeting, as well as the remote Plan review meeting.

City Responsibilities

- The City's project manager will facilitate the data gathering process to collect the details describing the technical team's desired modifications/enhancements.
- The City project manager will secure an appropriate meeting facility in which Woolpert will conduct the on-site review meeting.
- The City project manager will schedule all meeting attendees.
- All meeting attendees will actively participate in the on-site modification/enhancement review meeting without undue interruption.
- The City project manager and technical team members will review the 90-Day Modifications Plan and prepare comments.
- The City project manager and technical team members will participate in a remote conference call review meeting with the Woolpert project manager or senior systems analyst.

Sub-Task 5.1.3: 180 Day Review and Modifications

Woolpert will facilitate a One Hundred Eighty (180) Day Review and Modification meeting, up to six (6) hours in duration, with the City technical team for the purpose of reviewing the AM system implementation and usage since Go-Live and determining any desired system modifications. This meeting will be facilitated by Woolpert's project manager and a senior systems analyst, on site at the City's facilities. Woolpert will document all of the meeting discussion points and decisions and use this information to generate a 45 Day Modifications Plan. This Technical Memorandum will prioritize the desired modifications/enhancements by user group. Woolpert will submit this document to the City's project manager and facilitate a remote review meeting with the City's technical team.

Once all of the enhancements and prioritizations are agreed upon, Woolpert will commence in fulfilling the enhancement/modification requests that can be achieved in a twenty (20) man-hour period.

Related sub-tasks are as follows:

- **Sub-Task 5.1.3.1: City to Establish a Listing of Desired System Modifications (City-Owned Task)**
- **Sub-Task 5.1.3.2: Woolpert to Facilitate an On-Site Modifications Review Meeting with City Technical Team (On-Site Task)**
- Sub-Task 5.1.3.3: Woolpert to Prepare Draft 180 Day Modifications Technical Memorandum
- Sub-Task 5.1.3.4: Woolpert to Submit Technical Memorandum to City PM
- Sub-Task 5.1.3.5: Woolpert to Facilitate Remote Review Meeting with City Technical Team
- Sub-Task 5.1.3.6: Woolpert to Update Technical Memorandum per Review Meeting Results
- Sub-Task 5.1.3.7: Woolpert to Facilitate Agreed-Upon AM System Modifications

Deliverables

- Woolpert's Project Manager or Senior Systems Analyst will facilitate an on-site Modifications Review Meeting up to six (6) hours in duration with the City's technical team.
- Woolpert will generate a 90-Day Modification Plan, as more fully detailed above.
- Woolpert's Project Manager or Senior Systems Analyst will facilitate a remote 90-Day Modification Plan review meeting up to two (2) hours in duration with the City's technical team.
- Woolpert's implementation team will deliver up to a total of twenty (20) hours of system design, configuration, testing, and deployment services to achieve the goals of the 90-Day Modification Plan.

Assumptions

- The City's project manager will compile a listing of desired system configuration modifications/enhancements and provide same to Woolpert no later than one (1) week prior to the scheduled on-site review meeting.
- All system design, configuration, testing, training and deployment tasks are scoped to be performed remotely.
- Any work that the City determines needs to be performed on-site, instead of remotely, will need to be fit within the allocated budget, or the budget will need to be adjusted accordingly.
- The City's project manager will ensure site readiness and staff participation for the on-site review meeting, as well as the remote Plan review meeting.

City Responsibilities

- The City's project manager will facilitate the data gathering process to collect the details describing the technical team's desired modifications/enhancements.
- The City project manager will secure an appropriate meeting facility in which Woolpert will conduct the on-site review meeting.
- The City project manager will schedule all meeting attendees.
- All meeting attendees will actively participate in the on-site modification/enhancement review meeting without undue interruption.
- The City project manager and technical team members will review the 90-Day Modifications Plan and prepare comments.
- The City project manager and technical team members will participate in a remote conference call review meeting with the Woolpert project manager or senior systems analyst.

Task 5.2: Ad-Hoc Support (OPTIONAL-FEES NOT INCLUDED)

Woolpert implementation team members will be made available to the City's project manager/system administrators to provide any sort of non-scoped ad-hoc support that the City deems necessary. The City will define the requirements and whether the services can be provided remotely or if they will require an on-site trip. After presenting the requirements to Woolpert's project manager, resources will be scheduled for the work. Woolpert will inform the City project manager of the estimated number of hours, by staff type, required to fulfill each request and will then schedule the appropriate resources.

If a formal scope of services is required to define the tasks, the Woolpert project manager and City project manager will work together to develop it. Otherwise, for less complex requests, Woolpert will deploy the required resources for the agreed upon number of hours to fulfill the request.

Deliverables

- To be Determined.

Assumptions

- To be Determined.

City Responsibilities

- To be Determined.

Project Cost Estimates

Estimated Project Costs, inclusive of all labor and reimbursables, are provided in the following table. Work will be performed on a Firm Fixed Fee basis.

City of North Miami Cityworks AMS Implementation	
PROJECT ROLL-UP	\$198,718.00
Project Management	\$22,949.00
Project Kick-Off Meeting	\$8,104.00
PHASE 1: Implementation Planning	\$28,390.00
Task 1.1: Conduct Pre-Planning Discovery	\$4,967.00
Task 1.2: Install & Configure Core AMS Software (ON-SITE TASK)	\$2,480.00
Task 1.3: Provide Asset Management Software Demonstrations	\$1,666.00
Task 1.4: Conduct Business Process Reviews	\$10,306.00
Task 1.5: Geodatabase Design Review	\$7,550.00
Task 1.6: Phase 1 Quality Control	\$1,421.00
Task 1.7: Phase 1 Acceptance & Close	\$0.00
PHASE 2: Core System Design & Configuration	\$97,413.00
Task 2.1: Prepare Configuration Documentation	\$2,918.00
Task 2.2: Provide AMS Configuration Training	\$1,240.00
Task 2.3: Facilitate Core AMS Configuration	\$62,203.00
Task 2.4: Facilitate Inventory & Materials Management Configuration	\$16,664.00
Task 2.5: Review & Approval of Updated System Configuration & Documentation	\$2,476.00
Task 2.6: Provide AMS Software Demonstrations	\$7,852.00
Task 2.7: Phase 2: Quality Control	\$4,060.00
Task 2.8: Phase 2: Acceptance & Close	\$0.00
PHASE 3: Core System Deployment	\$35,168.00
Task 3.1: Develop Test Plan	\$2,860.00
Task 3.2: Provide Tester Training	\$2,480.00
Task 3.3: User Acceptance Testing (UAT) in Development Environment	\$9,100.00
Task 3.4: Provide End-User Training (EUT)	\$9,340.00
Task 3.5: Provide Go-Live Support	\$10,170.00
Task 3.6: Phase 3 Quality Control	\$1,218.00
Task 3.7: Phase 3 Acceptance & Close	\$0.00
PHASE 4: Advanced Configuration & Functionality	\$6,694.00
Task 4.1: Develop Custom Reports and Dashboards	\$6,288.00
Task 4.2: Phase 4 Quality Control	\$406.00
Task 4.3: Phase 4 Acceptance and Close	\$0.00

Project Schedule

A Microsoft Project Schedule Gantt Chart indicating appropriate project milestones and critical path will be developed once a final Scope of Work has been determined. The above detailed Scope of Work, as presented, can be delivered within thirty-Nine (39) weeks of receipt of a Notice-to-Proceed.