



Statement of Work

Cityworks AMS Implementation

City of Gahanna, OH

June 24, 2021





Implementation Services Statement of Work

Cityworks AMS Implementation

Woolpert, Inc.

Technology Services Practice

June 24, 2021

Prepared by Woolpert, Inc.

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Quality

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Document Acceptance

Table 1: Document Acceptance

Kevin Schultz

Information Technology Manager

City of Gahanna, OH

Date: _____

Jeff Pesler

Program Director

Woolpert, Inc.

Date: _____

Document Change Control

Table 2: Document Change Control

Change Record			
Date	Author	Version	Change Reference
2021.06.22	Pesler	1.0	Original
2021.06.24	Pesler	1.1	Updated Cost Summary with table including SeeClickFix and Cityworks costs.

File name: **OH_Gahanna_AMS Implementation SOW_20210622.docx**

General

The City of Gahanna seeks to increase departmental efficiency, accountability, and data accuracy through the enterprise implementation of Cityworks AMS. Woolpert has developed this Statement of Work (SOW) to address those overarching project goals and the following project objectives:

- Replace current multi-platform environment with an enterprise, cloud-based software platform
- Improve quality of services and responsiveness to citizen/stakeholder requests
- Standardize processes and workflows across the enterprise
- Automate workflows between functional areas of the City and related systems
- Minimize the need for extraneous, one-off software systems by centralizing technical functionality on core solutions (i.e. Asset and Work Management, Enterprise Resource Planning, etc...)
- Minimize the City's need to maintain custom software code for management of asset and work management functions
- Develop a system and process for staff to quickly/easily access the system from the field for reference and technical information as well as to input required data points
- Meet the needs of the organization and support the City's goals for performance measurement, transparency, and communication.

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 must be properly executed to ensure the successful deployment of a high-value Enterprise Asset Management System.

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 Client'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 the City's Request for Proposal and subsequent discussions with City staff.

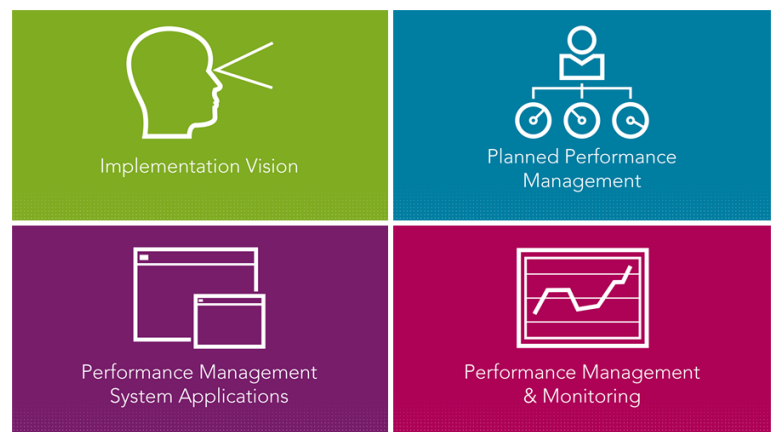


Figure 1: Enterprise Asset Management Implementation – Guiding Principles

- **Task 3.1 | Application Integration Development** is OPTIONAL and not funded in this SOW. If the City elects to proceed with this task a Change Control Notice (CCN) will be required.
- Woolpert requests that at least four (4) weeks' notice prior to kick-off in order to secure resources committed to this project.
- The following divisions will be implemented per this Statement of Work (SOW):
 - Gahanna Public Service Department
 - Administration
 - Utilities
 - Streets
 - Lighting

- Waste Collection
 - Facilities
- Parks & Recreation
 - Maintenance
 - Facilities
- Configuration will be best practice workflow development for the aforementioned divisions inclusive of materials management (Storeroom) and field optimization (Respond, Native Mobile App).
- Woolpert will apply best practice business processes and a pre-configured list of statuses for the City to utilize.
- The Fleet Division of Public Service will be included in **Task 1.6 | Technology Ecosystem Assessment** but is not included in the Cityworks AMS implementation tasks.
- The system will be designed to support a multitude of service request, work order, and inspection workflows using best practice templates configured by Woolpert.
- 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 Statement of Work, the Client 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.
- Woolpert assumes that there will be up to 60 end users of the system.
- The Client is to identify and empower a Project Manager.
- The Client is to identify and empower two project representatives from each of the user divisions to be implemented for a total of sixteen (16) core team members and one project manager. This will constitute the Client Core Team
- The Client is to identify and empower Technical Team members including a GIS SME, Systems Administrators, DBA's, and IT Support staff to provide technical support during the project
- Woolpert is prepared to deliver the project fully remote if necessary. Remote project delivery will require an update to the project schedule as durations for workshops will have to be extended.

Phase PM | Project Management

Successful delivery of the City's desired Asset Management System requires that the project be accurately planned and efficiently executed with key goals and objectives established, documented, measured, and monitored. These goals will be collectively developed by the City and Woolpert's and published to provide a clear understanding of critical success factors, timelines, and project milestones.

As shown in **Figure 2**, Woolpert's Project Management approach includes the methods, processes, resources, and tools needed to successfully manage the project life cycle, 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 initiate corrective actions.
- **Close-Out:** Acceptance of project deliverables and results.

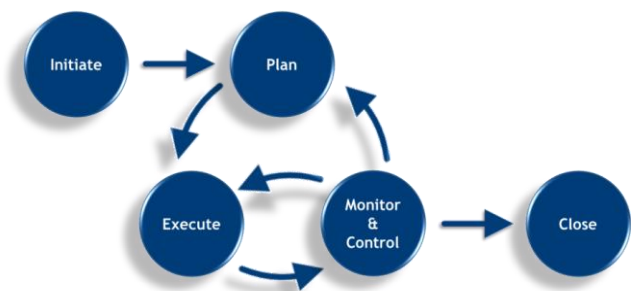


Figure 2: Project Life Cycle Process Groups

Included in our Project Management is a Project Plan, also commonly known as a Charter. Within the Project Plan, the tools for executing and controlling various project manager functions will be more fully defined. The components of a project plan include the following:

- **Project Overview** – Includes Project Background, Objectives, Team Members with contact information, and Role Definition.
- **Communication Plan** – Defines project management status and technical meetings as well as the types of communication (e.g., in-person meetings, emails, phone calls, WebEx meetings, etc.) within tasks, appropriate follow up/documentation of non-written communications (meeting minutes, follow-up emails, etc.), method for deliverable transmittals, etc.
- **Scope Management** – Includes a change control process.
- **Schedule and Resource Management** – Includes when and how the project schedule file will be updated and changes disseminated to the team, and which project resources will be included on each project task.
- **Work Breakdown Structure** – Includes the details of tasks to be performed for each phase including resources, dependencies, and timeline.
- **Invoicing Procedures** – Includes the frequency of invoicing, level of detail for each invoice line item, and required supporting documentation.
- **Risk Management and Issue Logging** – Includes description of rating risks and issues in terms of their probability of occurrence and impact, should they be realized.
- **Quality Management Plan** – Documents the expected level of quality control for the various stages of each deliverable.
- **Deliverable Acceptance and Phase Close-Out Process** – Identifies which tasks and phases require that the City acknowledge acceptance prior to moving forward on subsequent tasks.
- **Project Collaboration** – Woolpert will create a shared project website where project team members will post documents (e.g., scope of work, minutes, request for information, templates, project schedule, drafts documents, deliverables, etc.) to be shared with other project team members. It will also be used for tracking risk and issues.

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

PM 1 | Project Administration

Woolpert's project manager and support manager will facilitate the following **project administrative activities** on a recurring basis throughout the life cycle of the project:

- 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, and technical documentation, as well as other project collaboration tools.

Woolpert Team Tasks

- Develop draft project plan.
- Update the draft based on the City's feedback and submit the final project plan.

Client Tasks

- Assemble a team of domain and technical experts and ensure representation of all divisions/work groups involved throughout the project.

- Perform project administration activities as outlined above.
- Anticipate problem areas and propose and facilitate solutions.

Deliverables

- Draft and final project plan.
- Monthly project status reports.
- Ongoing project management, including resource allocation, invoicing, and general consulting.

- Provide a point of contact for all project management issues and questions.
- Review, comment, and accept draft project work plan within five (5) days of document delivery.
- Review and accept project status reports, or otherwise provide comments on same, within a reasonable time frame.

Assumptions

- The activities discussed in this section will begin once a written notice to proceed is received from the City.

PM 2 | Ongoing Project Management

Bi-weekly internal coordination meetings will be held to ensure continuous communication about tasks in progress, 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 ongoing resource loading.

Bi-weekly client status meetings will also be facilitated by Woolpert's project manager in coordination with the City's project manager and City team 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 team meeting participants will include Woolpert's project manager and ad hoc team members, as required. When feasible, these meetings will be held on-site at the City's facilities in conjunction with other scheduled on-site tasks. Otherwise, these meetings will be facilitated remotely using teleconference and web meeting tools.

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 team and City project participants.

Woolpert Team Tasks

- Bi-weekly internal coordination meetings.
- Bi-weekly project meetings with the City.
- Project schedule coordination.

Deliverables

- Meeting minutes from the monthly project meeting with the City.
- Updated project schedule in Microsoft project software.

Client Tasks

- Schedule appropriate internal staff and provide facilities for on-site meetings and off-site conference calls.
- Review the meeting minutes and provide feedback.
- Review the project schedule with Woolpert's project manager.

Assumptions

- The activities discussed in this section will begin once a written notice to proceed is received from the City.

Phase 1 | Implementation Planning

Implementation planning tasks ensure that the subsequent project tasks defined in Phases 2–5 are aligned with the City’s expectations. Each task in Phase 1 is designed to build on the prior task and will establish the implementation roadmap while uncovering gaps.

Included in this phase are tasks to:

1. Hold a **Project Kick-Off Meeting**. At the kick-off Meeting, the Woolpert Project Manager will facilitate a formal meeting to establish the parameters of the scope of work. Project details will be shared with a wider group of City Core Team including schedule, communication protocols, risk and issue management, and change management.
2. **Set-up and test Cityworks**. Woolpert will perform initial environment configuration and validation testing in the Cityworks Online (CWOL) environment. The City’s system administrators will be engaged to assist with this task as a knowledge transfer opportunity.
3. Provide Asset Management **Software Demonstrations** to future end users to begin the change readiness effort. Software demonstrations for future end users ensure that the entire organization is aware of the coming software change. This task will allow the City to identify misalignment within the departments and provide ample time for them to address concerns so that all personnel are ready to use the new software at go-live.
4. Facilitate **Discovery Workshops** with each department, including integration and legacy data migration discussions. During this task, the Woolpert team will facilitate workshops with each of the participating divisions. During the workshops, we will jointly define specific success criteria within each department, review legacy data that must be migrated, and discuss integrations and reporting needs.
5. Perform **GIS Review and Recommendations**. Woolpert will evaluate the City’s GIS data schema and will conduct a workshop with stakeholders to gather requirements for the system as an asset register. Woolpert will use information gathered with best practice schema designs by business area to develop a comprehensive GIS Recommendations document.
6. Conduct **Technology Ecosystem Assessment**. This task is intended to provide the City with a detailed analysis of current and future systems utilized by the City and how they relate to the AMS and each other. Woolpert will make recommendations for system consolidations where there are functional overlaps as well as to document details for integrations between systems.

Planning Tasks

- Project Kick-Off Meeting
- Set-up and Test Cityworks CWOL Environment
- Software Demonstrations
- Discovery Workshops
- GIS Review and Recommendations
- Technology Ecosystem Assessment

Task 1.1 | Project Kick-Off Meeting

As soon as is reasonably feasible, following receipt of the written notice to proceed, the Woolpert team 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 facility for the purpose of:

- Establishing the necessary project management protocols to be adhered to by all team members.
- Reviewing the City’s implementation goals and objectives with all team members.
- Identifying any City-owned source documentation necessary to support the project.
- Identifying all critical path schedule milestones.
- Addressing any outstanding scope or schedule questions that City stakeholders may have.

This meeting shall be up to two (2) hours in duration to address each of the items previously listed. Development of the kick-off meeting agenda shall be the joint responsibility of Woolpert and the City project manager.

Woolpert Tasks

- Develop kick-off agenda.
- Develop kick-off presentation.
- Facilitate kick-off meeting.
- Develop meeting minutes.

Deliverables

- Kick-off meeting agenda and presentation.
- Remote project kick-off meeting up to two (2) hours in duration.
- Kick-off meeting minutes.

Client Tasks

- Provide written notice to proceed.
- Support kick-off presentation development.
- Lead the kick-off meeting with Woolpert's project manager.

Assumptions

- All work in this task will be performed remotely.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

1.1 Kick-Off Meeting

- 1.1.1 Woolpert to Prepare Kick-Off agenda and Request for Information
- 1.1.2 Client PM to Collect RFI Data and Submit to Woolpert
- 1.1.3 Client PM to schedule Kick-off Meeting attendees
- 1.1.4 Woolpert to Facilitate Project Kick-Off Meeting with Client
- 1.1.5 Woolpert to Prepare & submit Project Kick-off Meeting Minutes to Client PM

Task 1.2 | Set-up and Test Cityworks CWOL Environment

This task will establish the hosted CWOL environment and pre-configured items. Prior to beginning the installation, Woolpert will provide a readiness checklist to the City's Cityworks application administration staff to ensure the hosted environment and services are prepared for the project. The Woolpert Lead Analyst will step the City's designated application administrators through the CWOL configuration interface at this time to initiate knowledge transfer. Woolpert will test administration credentials, validate site accessibility with Cityworks, and will configure baseline settings. At this time, Woolpert will provision a 2-tier environment consistent with application best practices—Test (TEST) and Production (PROD).

Woolpert Tasks

- Create checklist for software configuration and readiness.
- Set-up, configure, and test Cityworks TEST and PROD environments.
- Provide Cityworks AMS overview administrator training to the City's system administrators.

Deliverables

- Set-up, configuration, and testing of the core Cityworks software applications and databases (TEST and PROD).
- Cityworks training to the City's system administrators during the remote set-up and testing sub-tasks.

Client Tasks

- The City project manager will ensure the necessary staff participate in the training.
- Make any updates or modifications to the GIS architecture.
- The City Project Manager is responsible for ensuring that the Cityworks license agreement is executed in advance of the project.

Assumptions

- Training will be facilitated utilizing the CWOL environment.
- Woolpert will create a login for the necessary access to install software, set up databases, and test the software.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

1.2 Set-up and Test Cityworks CWOL Environment

- 1.2.1 Provide Client Readiness Checklist

Task 1.3 | Cityworks Software Demonstrations

Woolpert will facilitate up to four (4) hours of a software demonstration for the purpose of introducing the City's project team members to the new Cityworks application. The demonstration will provide an initial overview of the features and functions of the new software. The demonstration will ensure that the City has a basic level of exposure to the software before configuration efforts begin.

Woolpert Tasks

- Software demonstration environment preparation
- Facilitate software demonstrations.

Client Tasks

- Distribute demonstration agenda
- Provide on-site meeting space and technology peripherals
- Schedule participants and ensure their participation.

Deliverables

- Demonstration agenda.
- Software demonstration for up to four (4) hours.

Assumptions

- Demonstrations will be performed on-site during the week discovery workshops are held; otherwise, the demos will be performed remotely.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 1.3** **Cityworks AMS Demonstration**
- 1.3.1 Woolpert to Prepare Agenda for Demonstration
- 1.3.2 Facilitate Cityworks AMS Core Functionality Demonstration

Task 1.4 | Pre-Planning Discovery

Woolpert will facilitate Pre-Planning Discovery workshops for up to fourteen (14) hours. Workshops outcomes include City consensus on Cityworks global configuration settings, as well as the establishment of ongoing system maintenance activities that will be required in the future such as asset on-boarding (into the GIS), financial requirements, regulatory/compliance requirements, and enterprise activity workflow. Workshops outcomes will be documented in a technical memorandum and delivered to the City Project Manager for review and acceptance. Decisions made in this task provide the foundation to which the remainder of the project will align.

Woolpert Tasks

- Develop and submit RFI.
- Prepare best practice configuration standards
- Facilitate discovery workshops.
- Create technical memorandum.

Deliverables

- Request for Information (RFI).
- Up to fourteen (14) hours of discovery workshops with divisions identified in the general assumptions in this SOW.
- Technical memorandum.

Client Tasks

- Collect and provide requested information within five (5) business days of receipt of RFI.
- Schedule participants and ensure their participation in discovery workshops.
- Review, provide feedback, and accept technical memorandum.

Assumptions

- Data gathered from the RFI will be provided no later than one (1) week prior to the scheduled workshops.
- All activities other than the actual workshops will be performed remotely.
- If this sub-task is conducted on-site, discovery workshops will immediately follow software demonstrations.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

1.4	Pre-Planning Discovery
1.4.1	Create and Submit RFI to Client
1.4.2	Client to Gather and Submit RFI Data to Woolpert
1.4.3	Perform Desktop Audit
1.4.4	Facilitate Pre-Planning Discovery Workshops
1.4.4.1	Global Discovery
1.4.4.2	Public Service: Administration
1.4.4.3	Finance
1.4.4.4	IT/GIS
1.4.4.5	Parks & Rec
1.4.5	Document and Submit Discovery Findings Memorandum
1.4.6	Client to Review Discovery Findings Memorandum
1.4.7	Facilitate Review of Discovery Findings Memorandum
1.4.8	Update and Submit Final Discovery Findings Memorandum

Task 1.5 | GIS Review and Recommendations

By selecting the Cityworks solution as its asset management system, the City has committed to make their GIS the asset register of record for all assets to be tracked and managed through Cityworks. This means that the GIS data schema must include all assets for all functional areas as either a feature class or object class. Woolpert recommends this review to allow for a thorough examination of the City's GIS which will identify:

- Data schema update recommendations to meet goals, objectives, and requirements documented in Pre-Planning Discovery
- Attribution update recommendations for best asset management practices by asset class
- Recommendations for GIS and data structures to optimize compatibility with Cityworks functionality

Woolpert will request a full backup of the City's GIS and will review it remotely. A Woolpert Lead Analyst will develop the Recommendations Document based on best practice GIS data models for Cityworks and will deliver it to the City Project Manager.

Woolpert will facilitate a remote review meeting of the draft Recommendations Document. The document will be updated to final based on feedback obtained in the review meeting. The Recommendations Document will contain the following information:

- GIS data schema
- Asset hierarchy
- Asset types
- Attribution
- Domains/domain values

Woolpert Tasks

- Review City GIS back-up
- Develop DRAFT GIS Recommendations Document
- Facilitate remote review meeting of DRAFT document
- Update document to FINAL

Deliverables

- Remote review of City GIS back-up
- DRAFT and FINAL GIS Recommendations Document
- Remote GIS Recommendations Document Review Meeting

Client Tasks

- Provide all requested GIS data and documentation to support task activities.
- Schedule participants and ensure their participation in the remote document review meeting.
- Review and provide feedback on Recommendations document within five (5) business days.

Assumptions

- All activities workshops will be performed remotely.
- The City is responsible for implementing all GIS system updates specified in GIS Recommendations Document.
- City GIS updates must be made within timeframe established during project in order to preserve project delivery schedule.
- The GIS Recommendations Document is intended to present best practice schema models for asset classes managed by participating City divisions.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

1.5	GIS Review and Recommendations
1.5.1	Client to Submit GIS Back Up, Schema and Standards Documentation
1.5.2	Review and Assess Client GIS
1.5.3	Develop and Submit GIS Recommendations Document
1.5.4	Client to Review GIS Recommendations Document
1.5.5	Facilitate Review Meeting of GIS Recommendations Document
1.5.6	Update GIS Recommendations Document

Task 1.6 | Technology Ecosystem Assessment

The City has stated a goal of this project to minimize disparate, one-off system use while consolidating common functionalities on enterprise systems. Woolpert will analyze systems in order to identify functionality overlaps and opportunities for integrations. This task will result in a document outlining the system silos, recommendations for consolidation, and integrations. Integration opportunities will include documentation of the business case as well as key functional requirements. Woolpert establishes a complexity/cost/value framework for each system so that budgetary cost can be derived. This framework empowers the City with the best information possible with which to plan its technology strategy.

Woolpert will facilitate workshops over the course of eighteen (18) hours with City IT staff and stakeholders in related divisions. Workshops discussions will extract requirements, establish level of need, and recommend alternatives for each topic area. Woolpert will document workshop findings in a Systems Recommendations document which will be delivered to the City and reviewed remotely. Woolpert will update the document to final based on feedback obtained in the review meeting.

Woolpert Tasks

- Review systems evaluation RFI data
- Prepare for Assessment Workshops
- Develop DRAFT Ecosystem Recommendations Document
- Facilitate remote review meeting of DRAFT Ecosystem Recommendations Document
- Update to Final Ecosystem Recommendations Document

Deliverables

- Remote review of City systems data/information
- On-site Assessment Workshop for up to eighteen (18) hours
- DRAFT and FINAL Ecosystem Assessment Recommendations Document
- Remote Ecosystem Assessment Recommendations Document Review Meeting for up to four (4) hours

Client Tasks

- Provide data in response to RFI (Sub-Task 1.4.2).
- Schedule participants and ensure their participation in the remote document workshop and review meeting.
- Review and provide feedback on Recommendations document within five (5) business days.

Assumptions

- The assessment workshops will be facilitated on-site
- The City is responsible for implementing all Ecosystem Assessment Recommendations.
- Woolpert will refine scope, schedule, and fee for integrating Cityworks with Tyler Munis as part of this task.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

1.6	Technology Ecosystem Assessment
1.6.1	Prepare for Systems Assessment Workshops
1.6.2	Facilitate Systems Assessment Workshops
1.6.2.1	Finance - Tyler Munis Integration
1.6.2.2	Citizen Engagement - Options
1.6.2.3	AVL - Verizon Networkfleet Integration
1.6.2.4	Document Management - TCM Integration
1.6.2.5	Fleet Asset Management
1.6.2.6	Source Data (Asset & Service Request) Assessment
1.6.3	Develop and Submit Systems Recommendations
1.6.4	Client to Review System Recommendations and Provide Feedback
1.6.5	Facilitate Review of Systems Recommendations
1.6.6	Finalize and Submit Systems Recommendations Document

Task 1.7 | Quality Control

Woolpert technical resources not directly involved with this implementation will perform independent quality review of the work processes and deliverable products.

Task 1.8 | Acceptance and Close

The Woolpert Project Manager will submit a phase exit document to the City Project Manager for signature indicating that Phase 1 services have been delivered in accordance with the Scope of Work and Project Plan.

Phase 2 | System Design and Configuration

System Configuration tasks design and develop the Cityworks solution to meet the requirements of the City's user community as communicated by the City Core Team participants during the configuration workshops. The outcome of this phase is a Cityworks solution that is fully configured, has passed System Testing, and is ready for User Acceptance Testing.

Included in this phase are tasks to:

1. Develop the initial version of the **Cityworks Configuration Document**, complete with all of the known configuration items and data sets, and then configure Cityworks with all of this information in advance of the first round of workshops. This configuration document will be updated after each round of configuration workshops.
2. Facilitate a **Configuration Workshop** followed by documentation and configuration efforts, as Woolpert develops the Cityworks software for the requirements that are communicated by the City's Core Team members. The Configuration Workshop will cover the following topics:
 - a. **Cityworks AMS:** The outcome will be the configuration of service request, work order, inspection activities, and related Cityworks functionality.
 - b. **Cityworks Storeroom:** The outcome will be the configuration of storerooms to support material tracking activities.
 - c. **Cityworks Mobile Apps:** The outcome will be a plan for deployment of mobile apps to various City field staff and a defined configuration, where applicable, for the mobile apps interface.

Exposure to Cityworks during the collaborative workshops and ad hoc testing fosters knowledge transfer, which enables the Core Team members to be leaders during subsequent testing, training, and production support tasks.

Configuration Tasks

- Prepare Configuration Documentation
- Core Cityworks AMS Configuration
- Review and Approval of Updated System and Configuration Documents

Task 2.1 | Prepare Configuration Documentation and Configure System

The Woolpert team will compile a best practice driven, templated approach to Cityworks configuration for the City of Gahanna and distill this information into a series of configuration documents in MS Excel format. This configuration documentation, consisting of standard asset management system elements, as well as the customized details required to support the City's specific asset management program collected from the City's RFI response, will be used to guide the configuration of the asset management system. Configuration will be developed to meet requirements documented in Phase 1 that support project goals and objectives. Following the initial development of configuration documents, Woolpert will conduct a remote review meeting so the City can update as needed. Once the documents are received back from the City, Woolpert will proceed to perform initial configuration of the system in preparation for the Cityworks AMS workshop listed in task 2.2.

Specific Tasks

- Review of RFI data and Phase 1 deliverables
- Develop baseline configuration documentation
- Facilitate remote review meeting of configuration documentation with the City
- Update configuration documentation and develop baseline configuration in CWOL environment

Client Tasks

- Review the prepared draft configuration documentation.
- Participate in the remote review meeting.
- Provide configuration document feedback to Woolpert.

Deliverables

- Draft and updated configuration documentation
- Baseline CWOL AMS system configuration

Assumptions

- All tasks will be performed remotely.
- Baseline configuration will apply AM best practices

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 2.1 Prepare Configuration Documentation**
- 2.1.1 Prepare Draft Configuration Documentation
- 2.1.2 Client to Review Draft Configuration Document
- 2.1.3 Facilitate Remote Review Meeting with Client
- 2.1.4 Client to Update Configuration Document and Provide to Woolpert
- 2.1.5 Perform Initial Configuration

Task 2.2 | Configure Core Cityworks AMS Solution

As this is a Cityworks AMS best practices approach to implementation, Woolpert will facilitate Core Cityworks Configuration through one round of configuration workshops with the City. The workshops will be up to thirty-six (36) hours in duration with the City's functional units to fine tune the initial configuration. Woolpert will have already configured the best practices approach in Cityworks AMS, which will provide five (5) standard templates for each asset identified in Phase 1. The workshop configuration will validate the initial configuration and will build upon service request, work order, and inspection templates. Woolpert will provide access to the initial configuration prior to the workshops to the core team. This engagement will promote a higher level of system understanding and should result in a more efficient feedback process during this task. The workshop will review the following items in increasing levels of detail:

- **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 type of maintenance activity that will be performed on each asset in the system.
- **Inspections.** Woolpert will provide five standard inspection templates and modify these templates with the observations and results needed for the City.
- **Tasks.** Individual work items associated with a work order (e.g., a repair sewer main work order might have tasks to establish traffic control, utility locate, excavate, etc.).
- **Materials Hierarchy.** Organization and rules for items that are used to repair assets (e.g., pipes and meters).
- **Equipment Hierarchy.** Organization and rules for items that are utilized to complete a work order but are not consumed (e.g., 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 Cityworks AMS software.
- **Mobile.** Mobile setup and configuration for each crew.

After workshops are completed, Woolpert will work remotely to update the System Configuration Document and the Configuration with the information learned during the workshops. Updated configuration and configuration documentation will be delivered to the client to complete this task.

Woolpert Team Tasks

- Prepare for configuration workshops
- Facilitate configuration workshops
- Update configuration and configuration documentation

Deliverables

- Configuration Workshops Agenda
- One (1) round of on-site configuration workshops for up to thirty-six (36) hours in duration
- Updated configuration and configuration document.

Client Tasks

- Secure an appropriate workshop facility with appropriate technology peripherals.
- Coordinate and schedule workshop participants.
- Ensure that workshop participants actively engage with the system in preparation for workshops

Assumptions

- All work other than the workshops will be performed remotely.
- Workshops will be conducted on-site at City facilities.
- The geodatabase must be complete and approved with no schema changes before configuration workshops begin.
- Any configuration updates requested outside of the best practice configuration development will be put in a “parking lot” for consideration by the City Project Manager. If determined to be necessary, a CCN may be required to add scope, schedule, and fee.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 2.2 Core Cityworks AMS Configuration
 - 2.2.1 Prepare for AMS Configuration Workshops
 - 2.2.2 Client to Prepare for AMS Workshops
 - 2.2.3 Facilitate AMS Configuration Workshops
 - 2.2.3.1 Public Service (Utilities, Streets, Lighting, Fleet, Facilities) - Service Request, Work Order, Inspections
 - 2.2.3.2 Public Service (Utilities, Streets, Lighting, Fleet, Facilities) - Mobile and Respond
 - 2.2.3.3 Mayor's Office & Public Service (Administration) - Service Request, Work order, Inspections, Reporting
 - 2.2.3.4 Public Service (Waste Collection) - Service Request, Work Order, Inspections
 - 2.2.3.5 Public Service (Waste Collection) - Mobile and Respond
 - 2.2.3.6 Parks & Recreation (Maintenance & Facilities) - Service Request, Work Order, Inspection
 - 2.2.3.7 Parks & Recreation (Maintenance & Facilities) - Mobile and Respond

Task 2.3 | Review and Approval of Updated System Configuration and Documentation

Woolpert will submit the updated Configuration Documents 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. A remote review meeting will be facilitated by Woolpert to discuss the feedback. Upon completion of this task, Woolpert will have delivered a comprehensive set of configuration documents updated to reflect the current system configuration. There will be additional opportunities to make minor updates to this documentation in future project phases up to and including the user acceptance and testing. However, this task is performed to ensure that there are no major gaps in the system’s configuration prior to moving into the deployment phase.

Woolpert Team Tasks

- Update and submit updated configuration documentation and configuration
- Facilitate remote review meeting with the City’s core team.
- Update and submit the refined configuration documentation and configuration based on the outcome of the City review.

Deliverables

- Draft and updated configuration document and configuration.
- Remote review meetings for up to twelve (12) hours in duration.

Client Tasks

- The core team will review and provide feedback on the configuration document.
- The core team will participate in a remote configuration document review meeting.
- City Project Manager is responsible for accepting the configuration documentation and configuration.

Assumptions

- Phase 2 acceptance is required in order to initiate Phase 4 | Deployment tasks.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 2.3 Review and Approval of Updated System and Configuration Documents**
 - 2.3.1 Compile Updated Configuration Documentation
 - 2.3.2 Submit Updated Configuration Documentation to Client
 - 2.3.3 Client to Review Updated Configuration and Documentation
 - 2.3.4 Facilitate Remote Review Meeting with Client
 - 2.3.5 Update Configuration Documentation per Client Comments
 - 2.3.6 Submit Updated Pre-Final Configuration Documentation to Client
 - 2.3.7 Client to Review and Accept Pre-Final Configuration Documentation

Task 2.4 | Quality Control

Woolpert technical resources not directly involved with this implementation will perform an independent quality review of the work processes and deliverable products.

Task 2.5 | Acceptance and Close

The Woolpert Project Manager will submit a phase exit document to the City Project Manager for signature indicating that Phase 2 services have been delivered in accordance with the Scope of Work and Project Plan.

Phase 3 | Advanced Functionality

While previous phases focus on developing the core system functionality that supports work, asset, and material management activities, tasks in this phase are undertaken to deliver the advanced AM system functionality required to deliver robust Enterprise Asset Management capabilities that are a seamless extension/replacement of any existing technologies.

Included in this phase are tasks to:

1. Development of a software integration between Cityworks AMS and Tyler MUNIS (OPTIONAL)
2. Data migration of up to three (3) data sources to the GIS if asset data and to Cityworks if transactional data.
3. Woolpert will provide up to eight (8) standard reports that will be installed for use within the City’s Cityworks AMS environment.

Advanced Tasks

- Application Interface Development (Tyler Munis)
- Data Migration
- Reports and Dashboards

4. Woolpert will configure the standard dashboards up to two (2) for each position: supervisor, crew leaders, and field staff.

Task 3.1 | Develop Application Interfaces

The City has specified that an integration between the AMS and Tyler MUNIS is required in order to facilitate the seamless procurement of materials. Woolpert will initiate this task by facilitating a workshop to validate business use case(s), document technical and functional requirements documented in Task 1.6. The workshop will also draw out critical information in order to design the data point transfer between the two systems. Woolpert will document the findings of the workshop in a Software Requirements Specification (SRS). The SRS serves as the architecture manual for the integration development. Once the SRS is approved and the Cityworks configuration has been stabilized, Woolpert will begin development of the interface. Woolpert will iteratively test development as it is occurring and will engage the City technical team to test the deployment in the test tier environment. If any defects are found during testing, updates are made, and the testing process repeats until all parties are satisfied with test results. Woolpert will then deploy the final integration to the City's production environment.

Woolpert Team Tasks

- Facilitate integrations discovery workshops.
- Develop SRS documents.
- Facilitate remote review meetings.
- Develop Integrations.
- Deploy Integrations to Test environment.
- Support Integrations testing.
- Update Integrations per testing results.
- Deploy final Integrations to Prod.

Deliverables

- Remote integration discovery workshop up to eight (8) hours in duration
- SRS Draft Remote Review Meetings for up to twelve (12) hours.
- Draft and Final SRS Documents
- Integration Development
- Integration Testing Support
- Integration Deployment

Client Tasks

- Authorize this task in a CCN if option is selected.
- Participate in integration discovery workshops.
- Provide feedback on the SRS
- Provide IT support as requested by Woolpert during the development cycle.
- Provide data sets upon request for development and testing.
- Provide all server and system access required to develop and deploy integrations

Assumptions

- This task is OPTIONAL and is will require a CCN to authorize.
- Required City staff will be available for workshops, in-process review meetings, and development/deployment support sub-tasks.
- The City review team will provide feedback and approval on documentation within timeframe specified by the Project Management team.
- Test data necessary to fully test the integration will be in place and developed by the City technical team.
- All sub-tasks will be performed remotely by Woolpert.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 3.1 Application Integration Development Tyler MUNIS (OPTIONAL)**
 - 3.1.1 Gather Application Integration Requirements**
 - 3.1.1.1 Prepare for Integrations Workshop
 - 3.1.1.2 Facilitate Integrations Workshop
 - 3.1.1.3 Develop and Submit Draft SRS Document
 - 3.1.2 Develop Application Integration Software Specifications (SRS)**
 - 3.1.2.1 Client to Review Draft SRS Documentation
 - 3.1.2.2 Facilitate Remote Review Meetings with Client Technical Team
 - 3.1.2.3 Update Draft SRS Documentation per Client Review Comments
 - 3.1.2.4 Submit Updated SRS Documentation to Client PM

- 3.1.3 Develop and Deploy Application Integrations**
 - 3.1.3.1 Set-Up Development Environment
 - 3.1.3.2 Perform Application Coding / Development
 - 3.1.3.3 Develop Application Documentation
 - 3.1.3.4 Develop Application Test Plan
 - 3.1.3.5 Facilitate Application Testing Coordination and Support
 - 3.1.3.6 Facilitate In-Process Review Meetings
 - 3.1.3.7 Deploy Application to Production Environment

Task 3.2 | Data Migration

Woolpert will work with the City to understand their existing data sources and the future value that it may have in the to-be system. Woolpert will assess data sources which will be followed by up to eight (8) hours of workshops to leave no stone unturned in fully comprehending the City's need to migrate the legacy data. The workshop findings will be documented in a Data Migration Plan. This plan will contain details about the data sources, data mapping, and transfer methods. Once the Data Migration Plan has been accepted, Woolpert will begin developing migration scripts that will transfer and load the data from source to destination.

Woolpert will test the migration into the City's test database and will analyze the data results. Woolpert will provide the City with feedback to cleanse and re-extract legacy data from its source for a follow up test. After an acceptable test result has been achieved, Woolpert and the City will work jointly to define the final migration as part of the cutover tasks at go-live.

Woolpert Team Tasks

- Prepare for data migration workshops
- Facilitate data migration workshops
- Develop DRAFT data migration plan document
- Facilitate DRAFT plan review meeting
- Develop migration scripts
- Facilitate migration testing
- Facilitate final migration

Client Tasks

- Ensure participation of data SMEs in data migration workshops.
- Review and provide feedback on the data migration plan document
- Extract and cleanse data as specified in data migration plan for each test and final migration
- Provide necessary network and system access to Woolpert in order to perform the migration.

Deliverables

- Data migration workshops for up to eight (8) hours in duration
- DRAFT and FINAL Data Migration Plan Document
- Remote Data Migration Plan review meeting for up to eight (8) hours in duration
- Data migration scripts
- Test migration
- Final migration

Assumptions

- Up to three (3) data sources will be migrated.
- It is understood that some data sources may require migration to the GIS (asset register) and others migration to Cityworks (transactional data).
- All sub-tasks will be performed remotely by Woolpert.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 3.2 Data Migration**
 - 3.2.1 Develop Data Migration Plan**
 - 3.2.1.1 Prepare for Data Migration Workshops
 - 3.2.1.2 Facilitate Data Migration Workshops
 - 3.2.1.2.1 Asset Data Sources
 - 3.2.1.2.2 Service Request and Work Activity Sources

- 3.2.1.3 Document Data Conversion Workshop Findings and Decisions
- 3.2.1.4 **Submit Draft Data Conversion Plan Documentation**
- 3.2.1.5 **Client to Review Draft Data Conversion Plan**
- 3.2.1.6 Facilitate Data Conversion Plan Remote Review Meetings with Client Technical Team
- 3.2.1.7 Update Draft Data Conversion Plan
- 3.2.1.8 **Submit Updated Data Conversion Plan**
- 3.2.1.9 **Client to Review and Accept Data Migration Plan**
- 3.2.2 Migrate Legacy Data Sets to Destination System**
- 3.2.2.1 **Client to Generate Legacy Data Set Flat Files**
- 3.2.2.2 Configure Data Migration Environment on Woolpert Servers
- 3.2.2.3 Develop, Test, and Refine Data Loading Scripts
- 3.2.2.4 Perform Test Data Conversion Load to new Cityworks AMS Database in Test Environment
- 3.2.2.5 Review and Analyze Test Data Migration Results
- 3.2.2.6 **Client to Clean-Up Data as Required**
- 3.2.2.7 Update Data Conversion Scripts as Required
- 3.2.2.8 Reload Updated Data in Test Environment
- 3.2.2.9 Facilitate Data Conversion Review Meetings with Client Technical Team

Task 3.3 | Develop Custom Reports and Dashboards

The City will provide Woolpert with a prioritized list of reports during Phase 1. Woolpert will review the City's reporting list and select eight (8) standard reports from the Woolpert report library to setup and install. Similarly, Cityworks dashboards will be set up based on Woolpert's best practice standards for configuration of supervisors, crew leaders, and field staff.

Woolpert Team Tasks

- Deploy standard reports using Crystal reports.
- Configure best practice dashboards

Client Tasks

- Provide feedback/updates to reports list developed in Phase 1.
- Review and accept reports and dashboards
- Acquire any necessary licensing to develop and utilize reporting functionality.

Deliverables

- Up to eight (8) standard reports in Crystal reports
- Up to two (2) dashboards for each of the following positions: Supervisor, Crew Leader, Field Staff

Assumptions

- The City will have a license for Crystal reports.
- The City is responsible for any updates and modifications of standard reports and dashboards.

Related Sub-Tasks

Black: Woolpert team-owned remote task, **Blue: Woolpert team-owned on-site task**, **Green: Client-owned task** and **Red: Deliverable**

- 3.3 Standard Reports / Dashboard Setup**
- 3.3.1 Configure Standard Reports
- 3.3.2 Configure Standard Dashboards
- 3.3.3 Client to Review and Accept Reports and Dashboard in Development Environment**

Task 3.4 | Quality Control

Woolpert technical resources not directly involved with this implementation will perform independent quality review of the work processes and deliverable products.

Task 3.5 | Acceptance and Close

The Woolpert Project Manager will submit a phase exit document to the City Project Manager for signature indicating that Phase 3 services have been delivered in accordance with the Scope of Work and Project Plan.

Phase 4 | System Deployment

System Deployment tasks are intended to take a fully configured solution through the necessary steps from testing up to being used in a production environment to support the daily activities of the City stakeholder community. The outcome of this phase is a Cityworks solution that supports the tracking of service request, work order, and inspection activities and other related tasks.

Deployment Tasks

- Test Plan
- User Acceptance Testing
- End User Training
- Go-Live Support

Included in this phase are tasks to:

1. Woolpert will provide a sample Test Plan. The City will utilize the provided sample test plan to develop a city-owned **Test Plan**. This will ensure any system configuration issues are identified and system functionalities/capabilities are validated as a part of user acceptance testing.
2. Perform comprehensive **Tester Training** and **User Acceptance Testing** (UAT) to ensure that the solution functions as per the requirements gathered and documented in previous phases. Following acceptance of the test plan by Woolpert and the City, Woolpert will facilitate Tester Training classes for the City's testing team. Immediately upon completion of Tester Training, the City will execute the User Acceptance Testing activities. While it is the City's responsibility to assemble a team and manage the testing procedures in-house, Woolpert staff will be made available to provide assistance. Woolpert will update the Cityworks configuration and documentation based on the UAT results and feedback.
3. Provide **End User Training**. Both Woolpert and Cityworks maintains a library of training materials that are appropriate for supporting the needs of clients. Woolpert is recommending a **direct to end-user** approach to the End-User Training. This approach presents a balance between cost and risk, and it minimizes immediate risk to the project and longer-term risk to the City; the City showing ownership and knowledge with the Cityworks solution, and instills confidence among the City's user community. In this model, Woolpert and the City team will work collaboratively to develop and execute all aspects of user training.
4. Execute **Go-Live** immediately following the end-user training. Woolpert will conduct go-live tasks and provide remote go-live support.

Task 4.1 | Develop Test Plans

The focus of system testing efforts is to thoroughly test the newly installed/configured AMS solution and ensure all delivered functionality (application workflows, templates, reports) is properly functioning. Woolpert will provide a standard User Acceptance Testing (UAT) plan to the City. The City will utilize the test plan to perform hands-on testing of the newly configured system.

Woolpert Team Tasks

- Submit sample test plans
- Facilitate remote test plan review meeting
- Support City test plan development

Deliverables

- Sample test plan documents
- Remote test plan review meeting for up to two (2) hours in duration
- Support client test plan development for up to four (4) hours

Client Tasks

- Develop test plans within five (5) days of receipt of sample test plans
- Participate in remote review meeting

Assumptions

- City test plans will be developed to address end-to-end workflows.
- Woolpert will ensure that the system is capable of meeting City test plans
- All work performed as part of this task will be done remotely.
- The City will perform all customizations to the test plans.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

4.1 Test Plans

4.1.1 Develop and Submit Test Plan Document

4.1.2 Client to Update Test Plan

4.1.3 Facilitate Test Plan Review Meeting with Client

Task 4.2 | User Acceptance Testing (UAT)

User Acceptance Testing is the final step in validating the Cityworks AMS configuration is ready for production use. Woolpert will facilitate a tester training session to ensure that City testers are fully prepared to step through the test plans developed in the prior task and understand how to execute the process for communicating defects back to Woolpert for corrections. Immediately following tester training, Woolpert will provide remote support to the City's testers. Issues identified during the testing support period will be corrected immediately so that re-testing can occur under the guidance of the Woolpert team. Issues identified after the Woolpert testing support period will be corrected as quickly as possible. These issues may require that the Woolpert and City testers participate in a remote session so that Woolpert can understand the issues and facilitate the retesting. Post testing, Woolpert will update the Cityworks configuration and documentation based on the testing results.

Woolpert Team Tasks

- Prepare for tester training
- Facilitate tester training
- Support UAT
- Update configuration and configuration documentation.

Deliverables

- Remote tester training for up to eight (8) hours in duration.
- Support UAT during the ten (10) day client testing window.
- Updated configuration and configuration documentation.

Client Tasks

- Identify and ensure that testers are committed to system testing activities within specified testing window.
- Communicate configuration defects to Woolpert as discovered using mutually agreed upon process.
- Retest defect remedies within specified testing window.

Assumptions

- The City Project Manager is responsible for ensuring that City testers are available within the specified testing window.
- No additional configuration will be added during this task, only updates to existing configuration developed in Phase 2.
- Testers will be members of the City's core team.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 4.2 User Acceptance Testing (UAT)**
 - 4.2.1 Provide Tester Training**
 - 4.2.1.1 Create and Submit Agenda
 - 4.2.1.2 Client to Prepare Client Site for Tester Training
 - 4.2.1.3 Provide Tester Training
 - 4.2.2 Support User Acceptance Testing (UAT)**
 - 4.2.2.1 Provide UAT Support
 - 4.2.2.2 Client to Conduct UAT
 - 4.2.2.3 Update Cityworks AMS Configuration
 - 4.2.2.4 Update Configuration Documentation
 - 4.2.2.5 Client to Review and Accept UAT Results

Task 4.3 | End-User Training

End-user training is critical to ensuring that the organization is fully prepared to utilize the newly configured system on the first day of projection. Woolpert will schedule this task such that it occurs immediately prior to go-live in order to maximize trainee retention. The Woolpert team will provide training agenda and materials for end-user training classes. Training materials will consist of standard Woolpert team- and/or Cityworks-developed training guides to support City's specific business processes. As a fully customized set of training materials is not included in this scope, the City will develop custom business process training manuals, if needed.

The Woolpert team will conduct training using a direct to end-user approach. In this scenario, Woolpert team trainers will instruct all of the City's end-users over the course of five (5) business days. The goal of end-user training is to ensure that all system users have the confidence and competency to perform daily workflows in the Cityworks AMS system. End-user training will build upon knowledge transfer that occurs throughout the course of the project.

Woolpert will also conduct Cityworks Administrator training as part of this effort. Administrator training will step the City's designated system administrators through the system design interface. Completion of this course will ensure that administrators are able to manage and maintain Cityworks system configuration as workflows and processes change over time.

Woolpert Team Tasks

- Develop training plan
- Deliver Cityworks administrator training
- Deliver Cityworks end-user training

Deliverables

- Draft and Final Training Plan.
- Cityworks Administrator Training for up to eight (8) hours
- Cityworks End-User Training for up to forty (40) hours

Client Tasks

- Provide adequate training space and technology peripherals.
- Ensure that devices used by field staff are distributed for end-user training
- Modify and distribute training materials as needed.

Assumptions

- Classes can accommodate up to ten (10) trainees per class.
- Woolpert training materials are standard and will not be customized for the City.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

4.3 End-User Training (Direct)

4.3.1 Develop Training Plan

4.3.1.1 Develop and Submit Draft Training Plan

4.3.1.2 Client to Review Draft Training Plan

4.3.1.3 Conduct Draft Training Plan Review Meeting

4.3.1.4 Update and Submit Final Training Plan

4.3.2 Provide End User Training (EUT)

4.3.2.1 Prepare for EUT

4.3.2.2 Client to Prepare Client Site for Training

4.3.2.3 Conduct End-User Training

4.3.2.3.1 Designer Administrator Training (5 Users)

4.3.2.3.2 Cityworks Fundamentals Rd. 1 (10 Users)

4.3.2.3.3 Cityworks Fundamentals Rd. 2 (10 Users)

4.3.2.3.4 Cityworks Fundamentals Rd. 3 (10 Users)

4.3.2.3.5 Cityworks Mobile and Respond (10 Users)

4.3.2.3.6 Cityworks Advanced Functionality (10 Users)

Task 4.4 | Go-Live Support

This task includes all tasks (both Woolpert-owned and City-owned) that are necessary to ensure a smooth transition to the new Cityworks AMS solution. Cutover tasks are necessary to prepare the Cityworks production live use. Cutover tasks are anticipated to include ensuring that all devices requiring access to the Cityworks AMS application(s) are tested for connectivity; all devices requiring the ability to print documents are tested for connectivity; and all system user accounts are tested for login ability. Cutover also includes porting the configured and approved Cityworks AMS (and related) databases from the test environment to the production environment.

Each of these tasks will be shared by the Woolpert and City teams as determined during the project. Woolpert resources will provide up to three (3) days of on-site go-live support and up to sixteen (16) hours of remote go-live support during the first two weeks of system use. Woolpert will assist the City's end users and system administrators with site-specific access and configuration issues and application use and will provide additional coaching and supplemental training during the go-live support period.

Woolpert Team Tasks

- Support the development of the cutover plan
- Migrate configuration and data from the CWOL TEST environment to the PROD environment.
- Provide ad-hoc on-site and remote support during go-live.

Deliverables

- Draft and Final cutover plan
- Lead Analyst on-site support for up to three (3) days during go-live week.
- Lead Analyst remote support for up to sixteen (16) hours over the first ten (10) days of system use.

Client Tasks

- Jointly develop cutover plan.
- Execute tasks identified in cutover plan.
- Ensure that support is positioned appropriately for the organization.
- Provide all necessary data, access, and resources necessary to execute the cutover plan.

Assumptions

- Network infrastructure has been properly configured to support Cityworks use.
- The City Project Manager will acknowledge that the user community has been adequately trained and prepared.

Related Sub-Tasks

Black: Woolpert team-owned remote task, Blue: Woolpert team-owned on-site task, Green: Client-owned task and Red: Deliverable

- 4.4** **Go-Live Support**
- 4.4.1 Prepare for Cutover and Go-Live
- 4.4.2** **Migration to Cityworks Production**
- 4.4.2.1 Migrate AMS Configuration to Production Environment
- 4.4.2.2 Migrate Legacy Data Sets to Production Environment
- 4.4.3** **Go-Live Support**
- 4.4.3.1 [Provide On-site Go-Live Support](#)
- 4.4.3.2 Provide Remote Go-Live Support

Task 4.5 | Quality Control

Woolpert technical resources not directly involved with this implementation will perform an independent quality review of the work processes and deliverable products.

Task 4.6 | Acceptance and Close

The Woolpert Project Manager will submit a phase exit document to the City Project Manager for signature indicating that Phase 4 services have been delivered in accordance with the Scope of Work and Project Plan.

Phase 5 | Extended Support

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, and advanced functionality development. Woolpert will provide up to twenty-four (24) hours of on-site ad-hoc during the first five (5) months of system use. This time will be programmed as the project progresses and is intended to be responsive to the City’s needs.

Project Cost Summary

Project costs are summarized in the following table. Woolpert will pass-through licensing, implementation, and integrations costs to SeeClickFix and Cityworks as part of this project. The overall project not-to-exceed amount for year 1 is **\$275,892.50** inclusive of SeeClickFix year 1 licensing, implementation and integration, and Cityworks year 1 licensing. If the OPTIONAL Task 3.1 is authorized an additional \$60,000.00 will be added to the project through a CCN. This project will be delivered on a fixed-fee basis and invoiced monthly by percent complete.

	Without Options	With Options
Cityworks Implementation Services	\$225,392.50	*\$285,392.50
SeeClickFix Integration/Licensing*	\$10,000.00	**\$15,000.00
Cityworks Licensing**	\$35,500.00	\$35,500.00
Totals	\$270,892.50	\$335,892.50

Table 3: Total Project Summary

*Includes \$60,000.00 for Task 3.1 | Integration with Tyler Munis

**Includes \$5,000.00 for branded marketplace app

WBS	Task Name	Cost	Optional
PM	Project Management	\$28,387.50	
Phase 1 Implementation Planning			
1.1	Kick-Off Meeting	\$1,300.00	
1.2	Install and Configure Core Cityworks AMS Software	\$3,100.00	
1.3	Cityworks AMS Demonstration	\$1,940.00	
1.4	Pre-Planning Discovery	\$9,470.00	
1.5	GIS Review and Recommendations	\$17,370.00	
1.6	Systems Ecosystem Assessment	\$19,270.00	
1.7	Phase 1: Quality Control	\$2,145.00	
1.8	Phase 1: Acceptance and Close	\$0.00	
	Phase 1 Subtotal	\$54,595.00	
Phase 2 Core System Design and Configuration			

2.1	Prepare Configuration Documentation	\$9,510.00	
2.2	Core Cityworks AMS Configuration	\$14,160.00	
2.3	Review and Approval of Updated System and Configuration Documents	\$5,020.00	
2.4	Phase 2: Quality Control	\$1,485.00	
2.5	Phase 2: Acceptance and Close	\$0.00	
	Phase 2 Subtotal	\$30,175.00	
Phase 3 Advanced Configuration and Functionality			
3.1	Application Integration Development (OPTIONAL)		\$60,000.00
3.2	Data Migration	\$29,140.00	
3.3	Standard Reports / Dashboard Setup	\$2,480.00	
3.4	Phase 3: Quality Control	\$4,620.00	
3.5	Phase 3: Acceptance and Close	\$0.00	
	Phase 3 Subtotal	\$36,240.00	\$96,240.00
Phase 4 System Deployment			
4.1	Test Plans	\$4,030.00	
4.2	User Acceptance Testing (UAT)	\$11,220.00	
4.3	End-User Training (Direct)	\$13,060.00	
4.4	Go-Live Support	\$13,020.00	
4.5	Phase 4: Quality Control	\$1,815.00	
4.6	Phase 4: Acceptance and Close	\$0.00	
	Phase 4 Subtotal	\$43,145.00	
Phase 5 Extended Support			
5.1	Facilitate Cityworks Check-Up 1	\$3,450.00	
5.2	Facilitate Cityworks Check-Up 2	\$3,450.00	
5.3	Facilitate Cityworks Check-Up 3	\$3,450.00	
	Phase 5 Subtotal	\$10,350.00	

99	Travel and Reimbursables	\$22,500.00	
	Total w/out options	\$225,392.50	
	Total w/ options		\$285,392.50

Table 4: Cityworks Implementation Cost Summary

Rate Schedule and Invoicing

Woolpert has the ability to apply the following rates by role to the project. If desired, certain phases of the project can be delivered on a time & materials basis using the rate table below.

Woolpert Role	Hourly Rate
Project Manager	\$165.00
Lead Systems Analyst	\$155.00
Support Systems Analyst	\$120.00
Team Lead Analyst/SME	\$175.00
Senior Developer	\$170.00
Developer	\$145.00
Admin	\$95.00

Proposed Schedule and Timeline

We anticipate that this project will take approximately 11 months to complete, beginning on September 1, 2021 and going live on June 20, 2022. Note: timelines may be shifted to accommodate extended workshop durations due to the need to deliver on-site workshops remotely and will be impacted by the selection of options.

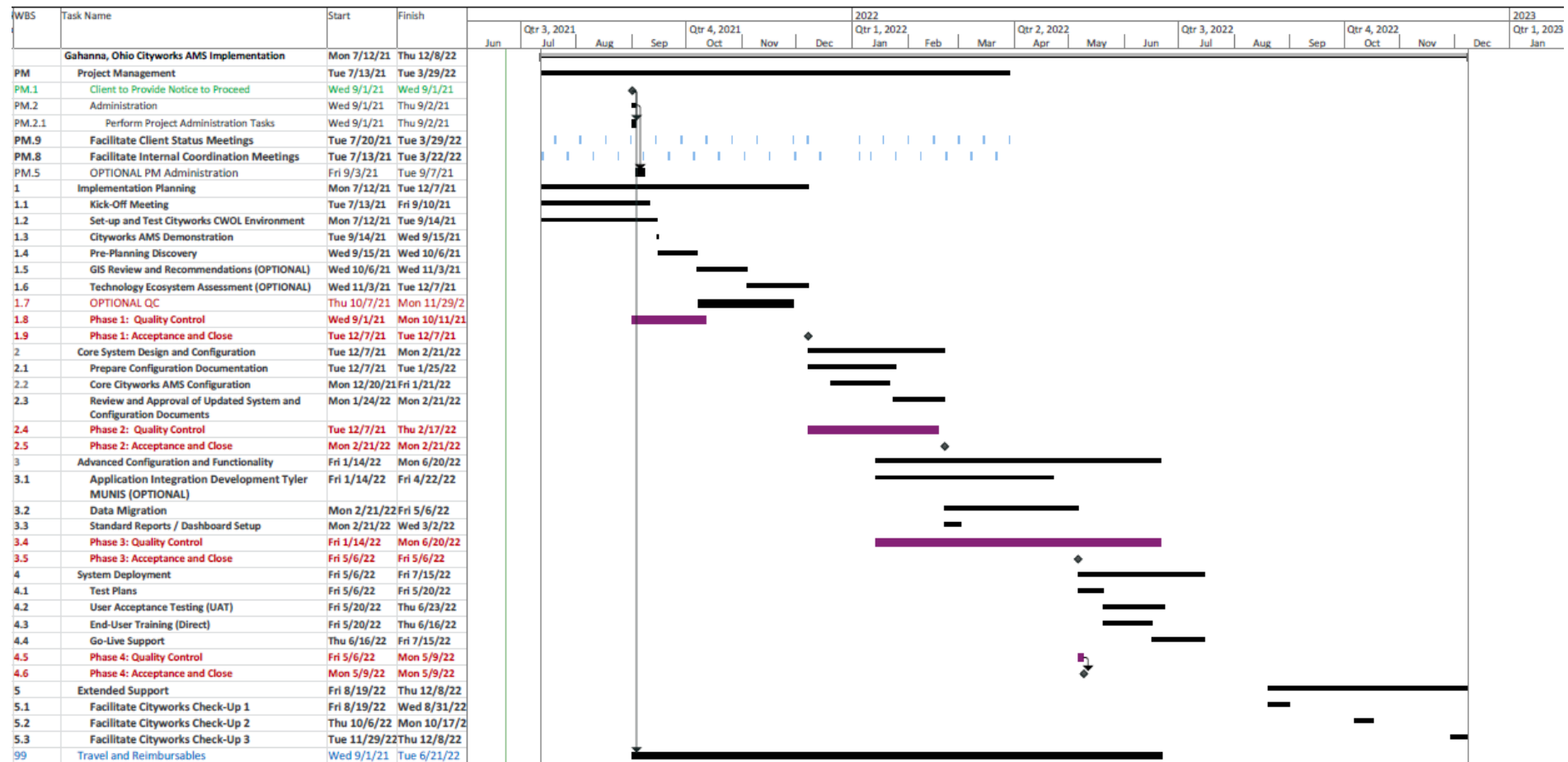


Figure 3: Proposed Timeline

