Green folder for tonight.

Debbie Tarry
City Manager
City of Shoreline
17500 Midvale Ave N.
Shoreline, WA 98133

-----Original Message-----
From: Debbie Tarry
Sent: Monday, June 23, 2014 1:02 PM
To: Will Hall; John Norris
Cc: Carolyn Wurdeman; Katherine Moriarty; Robert Hartwig
Subject: RE: CMMS contract

Will -

Attached you will find a response to your question below. Please let me know if you would like any additional information. We will go ahead and add this to I-Legislate for the entire Council. If possible could you let me know if you think you will be pulling this from consent - I have a 4:45 meeting with the Mayor so I'd like to confirm with her and also so Katie will be prepared for any staff presentation.

Debbie Tarry
City Manager
City of Shoreline
17500 Midvale Ave N.
Shoreline, WA 98133

-----Original Message-----
From: Will Hall
Sent: Sunday, June 22, 2014 5:34 PM
To: Debbie Tarry; John Norris
Cc: Carolyn Wurdeman
Subject: CMMS contract

What was the total dollar amount (for all phases, if phases were presented) for the IT work presented to and approved by council for the asset management system? And if there was more than one figure presented in staff reports for the contract and CIP or in other discussions, then I would like all figures and the dates they were presented and the council actions on them.

I am likely to pull this from the consent agenda, but I want this answer so I can research the background first.

Will Hall, Councilmember
City of Shoreline
17500 Midvale Ave N
Shoreline, WA 98133

206-373-1630

1. **Staff Report #1 – March 25, 2013 <mark>(Attached)</mark>**
Requested Action: Council authorize the City Manager to execute contracts with Azteca Cityworks in the amount of $78,183 ($71,000 license fee plus sales tax of $7,183) plus future annual license fees for the CMMS and with Woolpert in the amount $146,200 (*there was a later amendment in the amount of $400 to take this to $146,600)* for Phase I implementation of the CMMS.
Phase I of the project included: City-wide Assessment (<mark>scope of work attached</mark>), Implementation of CMMS for the Surface Water Utility, 311 System. Ultimately we decided not to do the 311 because there is more opportunity to partner with See-Click-Fix and as a result the Phase I costs came to $123,776 or $22,824 under the authorized amount.
Future Phases and costs: The total budgeted dollars for the CMMS as of March 25, 2013 was $403,539. Based on the budget and costs at that time, the anticipated remaining balance for future Phase II costs was $179,156. The purpose of the City-wide assessment was to help identify the costs of future phases for remaining City asset classes including streets, fleet, facilities, customer response team, parks, traffic, and administration. The staff report contained a section on other potential future costs that were unknown including potential costs related to migration/conversion of data, additional GIS and staff support resources to implement future phases including asset inventorying and project management. Also the original contract for licensing ($78,183) was for 25 user licenses. At the time the contract was signed the full enterprise license for access to all software modules and unlimited users was $180,000. It was determined at the time that we may have to go to the full enterprise license in the next few years, but didn't need to spend the cash at the current time. Azteca Cityworks provided in the contract that we would be able to credit the original 25 user license fee against the enterprise license fee if purchased by December 31, 2014. During the project implementation with Surface Water the grant available for this work increased by approximately $10,000, increasing the amount available for the overall project to $413,539.

2. **2014 Budget**
The 2014 budget included the creation of a new staff position – Engineering Technician - whose purpose was to help with implementation and maintenance of the CMMS for surface water streets/traffic/. The annual cost for this position is not included in the project budget, but will be an on-going cost related to the implementation of CMMS as part of the way the City does business going forward. The 2014 budgeted cost is $89,938.

3. **Staff Report #2 – 2013 Capital/Operating Budget Carry-overs and Amendments**
 Ordinance No. 685 included $218,137 of "carry-over" funds from 2013 to 2014. Of this amount approximately $208,000 was available for Phase II costs, as there were still outstanding invoices for the city-wide assessment.

4. **Staff Report #3 – February 10, 2014 – Update of Surface Water Asset Management System**
This briefing was to update Council on the successful implementation of CMMS for the surface water utility. There was no discussion related to financial impact or budget in this staff report or during the presentation.

5. **Staff Report #4 – Tonight – Phase II Contract**
The staff report identifies the $218,000 that was included as a carry-over from 2013 to 2014. Of this amount approximately $208,000 was available for Phase II, including licensing. Since the original purchase of per user licenses in 2013, Cityworks has developed an enterprise license arrangement that allows for use of all software modules and unlimited users as an annual operating cost versus a license acquisition and then annual maintenance cost. The original

concept of purchasing the enterprise license for $180,000 would have had an annual maintenance cost of approximately $54,000. Under the new license arrangement the City will pay a $30,000 annual fee through 2017, and then go to a $60,000 annual license fee in 2018 (anticipating the addition of the sewer utility). So of the $208,000 available for Phase II, $30,000 will be for licensing leaving a balance of $178,800 for Phase II implementation. The anticipated cost for Woolpert support in implementing CMMS for streets/traffic/fleet/facilities is $206,899. This left a gap in the project budget of $28,099. This gap is being filled with allocating salary savings from the public works budget in 2014 towards the project. In sum this would bring the costs to $438,858.

Phase I Licensing	$ 71,000*
Phase II Licensing	$ 30,000
Phase I Woolpert	$123,776
Phase II Woolpert	$206,899
Total	$431,675

*Sales tax of $7,183 was paid on the original license purchase

Future Costs: As identified in the staff report it is anticipated that to implement CMMS for parks that the support costs from Woolpert will be approximately $80,000. Also the report identifies that there could be future costs of $150,000 for future software integration and potentially for third party software, including condition assessment tools for City facilities and assets. This is an estimate and would need to be further evaluated. The combination of these two items ($230,000) plus the $431,675 make for a projected total project cost of $661,675. When adding the sales tax from the original license purchase the total project cost would come to $668,858. The $230,000 is not currently budgeted in the 2014 budget and will need to be considered in future budget allocations. It is also likely that there will need to be at least one more staff position in the future to provide support for CMMS implementation and on-going service for parks/fleet/facilities.

CITY COUNCIL AGENDA ITEM
CITY OF SHORELINE, WASHINGTON

AGENDA TITLE:	Authorizing the City Manager to Execute Contracts with Azteca Cityworks in the amount of $78,183, Plus Future Annual Maintenance Fees, for the Acquisition of a Computerized Maintenance Management System (CMMS) and with Woolpert in the Amount of $146,200 for Phase I of the system implementation
DEPARTMENT:	City Manager's Office
PRESENTED BY:	Debbie Tarry, Assistant City Manager
ACTION:	____ Ordinance ____ Resolution _X___ Motion ____ Discussion ____ Public Hearing

PROBLEM/ISSUE STATEMENT:

The City needs to update its current enterprise resource planning software, with a Geographic Information System (GIS) centric Computerized Maintenance Management System (CMMS). The CMMS serves as the City's asset management system and will be used to track assets, service requests, work orders, and asset condition assessments for the City's existing surface water utility assets (pipes, catch basins, detention facilities, pumps, etc.), roads, street signals and signs, parks and park amenities and facilities. The asset management system will also be critical for the future management of the wastewater and water utilities.

The City issued a request for proposal (RFP) for CMMS software in December 2012 to replace our existing planning software installed in 2000, a product of Hansen Information Technologies, now Infor Public Sector. The City received ten (10) proposals with initial pricing ranging from $197,100 to $831,376 for acquisition and implementation. After reviewing the proposals it was determined that there were four firms that most closely met the requirements of the RFP. In January 2013 the City invited four vendors for demonstrations and interviews. Following the on-site demonstrations staff conducted visits to other agencies, did reference checks, and conducted on-site demonstrations with other agencies using the various software. Based on the outcome of this process, staff is recommending that the City acquire CMMS software from Azteca Cityworks and utilize Woolpert as the implementation partner.

Staff is recommending that the City purchase twenty-five (25) user licenses for the software in the amount of $71,400 plus applicable sales tax ($78,183) from Cityworks. The annual maintenance fee for these licenses is $16,175. The City can convert the individual licenses to an unlimited site license at any time in the future and apply the user licenses fee ($71,400) against this cost.

Staff is also recommending that Council authorize the City Manager to execute a contract with Woolpert for Phase I of the CMMS implementation in the amount of $146,200.

RESOURCE/FINANCIAL IMPACT:
The 2012 budget included $273,539 for the acquisition, implementation and licensing of CMMS software and 2013 budget included an additional $130,000 that could be used for the CMMS. The unspent 2012 funds will be carried over to the 2013 budget and included in the budget carry-over ordinance scheduled for Council action on April 8. This brings the total budget available for the acquisition and implementation of the CMMS to $403,539. The current proposed contracts are for $78,183 for Azteca Cityworks and for Phase I of the implementation with Woolpert in the amount of $146,200. This leaves a project balance of $179,156 for Phase II implementation, data migration and/or system integration with the City's permitting or financial system if required.

<u>RECOMMENDATION</u>
Staff recommends that Council authorize the City Manager to execute contracts with Azteca Cityworks in the amount of $78,183 plus future annual license fees for the acquisition of a Computerized Maintenance Management System (CMMS) and with Woolpert in the amount of $146,200 for Phase I implementation of the CMMS.

Approved By: City Manager *JU*   City Attorney *IS*

INTRODUCTION

The City needs to update its current enterprise resource planning software, Infor Public Sector (formerly known as Hansen Information Technologies), implemented in 2000, with a Geographic Information System (GIS) centric Computerized Maintenance Management System (CMMS). The CMMS serves as the City's asset management system and will be used to track assets, service requests, work orders, and asset condition assessments for the City's existing surface water utility assets (pipes, catch basins, detention facilities, pumps, etc.), roads, street signals and signs, parks and park amenities and facilities. The asset management system will also be critical for the future management of the wastewater and water utilities.

BACKGROUND

GIS is the most powerful software and database system for managing an inventory of geographically distributed assets such as roadways, bridges, traffic control, parks and park amenities, facilities, trees, surface water systems, water and wastewater systems, and so forth. GIS centric system means that the asset records are fully integrated with the GIS mapping of the City's various asset systems and those records can be accessed and updated by using map locations. For those assets that may not be "location specific" such as components of a pump station, assets and their related maintenance and condition records can be stored independently of a GIS location within a GIS centric system.

The City's current CMMS software (Hansen 7.0) is not GIS centric and has not been able to meet the City's asset management needs. Additionally the City must update its Windows operating system from Windows XP to Windows 7.0 in 2014 since Windows XP will no longer be supported by Microsoft after April 2014, and the City's current CMMS is not compatible with Windows 7.0.

The City began planning for a new CMMS in 2011 by reviewing the needs of its surface water utility. The 2012 budget included $233,539 in unspent funds for acquisition and implementation of a CMMS and $40,000 for anticipated annual maintenance fees. This included $60,000 in grant funds from the Department of Ecology (DOE) to apply towards the implementation of an asset management system for the City's surface water utility. The 2013 budget included an additional $90,000 that could be used for acquisition and implementation and $40,000 for annual maintenance fees. This brings the current authorized budget to $403,539. The DOE grant funds must be expended by June 30, 2013.

The City conducted the CMMS request for proposal (RFP) process in 2012. The City's Information Technology Manager left employment with the City in November 2012 and at that time the project management was assigned to the Assistant City Manager. The City issued the RFP on November 5, 2012. Responses were due on December 14, 2012. The City received ten (10) proposals. Based on the following criteria the proposals were narrowed to four (4) for on-site demonstrations and interviews:

- Related Experience and Past Performance **15 points**
- System Technology Requirements **30 points**
- Implementation and Workflow Automation Requirements **25 points**
- Cost/Budget **30 points**

Maximum points -100

A team of employees, along with support from an HDR engineer with specific expertise in asset management,, participated in the demonstrations and interviews. Employees also did site visits to other agencies and reviewed references. Based on this additional analysis, staff recommends that the City acquire the CMMS from Azteca Cityworks and engage Woolpert as the implementation partner.

DISCUSSION

Azteca Cityworks - Software Licensing
Cityworks provides a variety of licensing options for their software. Over the long-term it is likely that the City will want to purchase unlimited site licensing for the CMMS software, especially with the need for maintaining the assets of the future wastewater (sewer) and water utilities. Although this is the case, staff recommends that the City invest in a limited license option (25 licenses) at this time and purchase the unlimited site license option in the future. The unlimited site license includes all Citywork asset management modules for a purchase price of $180,000 and annual maintenance fee of $36,000 (20% of the purchase). Cityworks has agreed to a purchase price of $71,400, plus applicable sales tax, for 25 licenses (approximately 12% discount from their normal pricing) with an annual maintenance fee of $16,175. They have also agreed to apply the $71,400, at any time in the future, towards the acquisition of the unlimited site license. Cityworks has agreed to maintain the $180,000 unlimited site license pricing and $36,000 annual maintenance fee through December 31, 2014, if the City decides to acquire the unlimited license by that time. The $71,400 initial license payment will also apply towards the future purchase of an unlimited site license anytime after December 31,2014.

Woolpert Implementation
Cityworks uses a model of partnering with other firms to provide implementation, data migration, and system integration services. In fact three of the RFP responses included Cityworks software from three different implementation partners.

Woolpert has agreed to a two phased approach for implementation. Phase I will include the surface water utility implementation (system design and configuration), installation and implementation of Woolpert's e311 tool, development of required reports including those reports required to comply with the City's NPDES permit, and an on-site assessment for roads, street signals and signs, parks, and facilities assets. The deliverable from the on-site assessment will include a complete project plan, including budget, for asset identification, service request and work order set-up, and reporting requirements for the roads, street signals and signs, parks, and facilities assets. This will also allow staff and the consultant to agree on data migration needs from existing systems and future system integration with the City's financial and permitting software. Staff has also requested that Woolpert assist in identifying any supplemental resources that the City may need to consider in order to have successful implementation across all of the future asset areas . Staff anticipates that additional GIS support will be one of those items required for Phase II implementation. The total cost for Phase I is estimated at $146,200.

<u>Other Potential Future Costs</u>
The CMMS project may include the need to migrate and convert data from the current non-GIS centric system to the new system. The cost of this will be estimated during the on-site review.

Additionally the City anticipates that there are adequate GIS and staff support resources for the surface water utility implementation, but it is likely that the City may need to consider more support for the implementation for other asset classes. This could include asset inventorying, additional GIS support, and project management. Costs for these services will be more clearly identified in the on-site analysis.

The intent of the CMMS system is to allow field personnel to update work order activity and maintenance records in the field in real time. This will require the acquisition of appropriate hardware (laptops or tablets) for field staff to conduct this activity. The acquisition of the equipment will purchased from the CMMS acquisition budget. It is likely that there will be new on-going costs for data plans to allow for remote internet access that facilitates updating asset records in the field.

RESOURCE/FINANCIAL IMPACT:
The 2012 budget included $273,539 for the acquisition, implementation and licensing of CMMS software and 2013 budget included an additional $130,000 that could be used for the CMMS. The unspent 2012 funds will be carried over to the 2013 budget and included in the budget carry-over ordinance scheduled for Council action on April 8. This brings the total budget available for the acquisition and implementation of the CMMS to $403,539. The current proposed contracts are for $78,183 for Azteca Cityworks and for Phase I of the implementation with Woolpert in the amount of $146,200. This leaves a project balance of $179,156 for Phase II implementation, data migration and/or system integration with the City's permitting or financial system if required.

RECOMMENDATION
Staff recommends that Council authorize the City Manager to execute contracts with Azteca Cityworks in the amount of $78,183 plus future annual license fees for the acquisition of a Computerized Maintenance Management System (CMMS) and with Woolpert in the amount of $146,200 for Phase I implementation of the CMMS.

Project Kick-Off Meeting (on-site)

As soon as is reasonably feasible, following receipt of the Written Notice to Proceed, Woolpert's Project Manager will work with the CoS's Project Manager to schedule the Kick-Off Meeting. This meeting will be facilitated on-site at CoS offices for the purpose of: 1) establishing the necessary Project Management protocols to be adhered to by all stakeholders, 2) reviewing the CoS's implementation goals and objectives with all team members, 3) identifying any CoS-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 CoS stakeholders may have. Development of the Kick-Off Meeting agenda shall be the joint responsibility of Woolpert's and the CoS's Project Manager.

Project Schedule Coordination

Project Schedule coordination and management will be managed using Microsoft Project. The project schedule will be monitored and adjusted as needed. An updated Project Schedule delineating resources, scheduled tasks, and completed tasks will be maintained and available to all Woolpert and CoS project participants.

Status Meetings

Woolpert will facilitate a regular occurring status meeting, either bi-weekly or monthly as needed. Woolpert's Senior Cityworks Specialist will lead a regularly scheduled on-site / offsite project status meeting with the CoS'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; 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. CoS meeting participants will be determined as necessary by the CoS's Project Manager, or as requested by Woolpert's Project Manager. All on-site project status meetings will be co-facilitated with a scheduled on-site meetings.

Internal Status Meetings

Internal status meetings will be held on a weekly basis to ensure communication and status. These meetings will allow the Woolpert team to ensure the configuration is developed in a way to support a set of sustainable integrations and vice versa.

Project File Repository

Immediately following notice to proceed, Woolpert will create a DropBox (DB) file location and invite as many key CoS staff as required. DB will be used as the central location for all project documentation and content.

Deliverables

- Draft Project Plan in MS Word or Adobe PDF format.
- Kickoff meeting agenda in MS Word and/or Adobe PDF format.
- On-site project kickoff meeting (1/2 day).
- Final Project Plan in MS Word or Adobe PDF format.

- Monthly status reports uploaded to DropBox. This monthly report will serve at the project status report deliverable.
- Regular status meetings either bi-weekly or monthly, as needed.
- Internal status meetings.
- On-going project management, including resource allocation, invoicing and general consulting.
- Project file repository.
- Issue log management.

Assumptions

- Provide a point of contact for all project management issues and questions.
- Review, comment, and acceptance of Draft Project Plan within five (5) days of document delivery.
- Schedule with staff and provide facilities for on-site meetings and off-site conference calls.
- Review and accept project status reports.
- Schedule meeting space appropriate for the kickoff meeting.
- Coordinate and schedule meeting attendees.
- The invoice should be accompanied by an updated schedule with updated % completes.

Client Responsibilities

- CoS will create and structure a core project team. Team will contain a mix of domain and technical experts and have representation from, at minimum, each of the different sections involved in the implementation.
- Invoices will be uploaded to project website and a notification will be sent to the CoS Project Manager for review and approval.

TECHNICAL SCOPE OF SERVICES

Services, and associated deliverables, are categorized into three major phases:

- Phase 1 | Conduct City-wide Assessment.
- Phase 2 | Implement Cityworks for Stormwater Division.
- Phase 3 | Implement e311.

Woolpert recommends the project begin with Phase 2 because the Stormwater division has grant money for the implementation that must be used by June 30th, 2013. Phase 3 will begin once Phase 2 is complete. Phase 1 will begin at the same time Phase 3 begins and is not dependent on either Phase 2 or Phase 3. Woolpert created the phase order based on how the services are typically executed.

PHASE 1 | CONDUCT CITY-WIDE ASSESSMENT

Task 1.1 | Hold Staff Interviews (on-site)

Sub-Task 1.1.1 | Develop Request for Information Memorandum (off-site)

Woolpert will develop a Request for Information (RFI) to be used by our interview team to facilitate a discovery process through subsequent staff interviews. The request will include detailed information about:

- **Existing IT environment** – hardware, software and peripheral devices currently used to support the CoS's daily maintenance management business requirements, including workstations, servers, printers / plotters, communications and mobile devices. Woolpert will also investigate the ability of the CoS's IT department to support the AMS needs of the various user divisions.
- **GIS usage** – how the CoS's existing GIS is utilized by each department / division to support maintenance management planning, performance and reporting, including a listing of GIS feature and object classes, their relationships, attribution and maintenance / update cycles.
- **Assets** – the type and quantity of assets that are maintained by a particular department / division.
- **Asset Levels of Service and Performance Indicators** – a discussion and documentation of any established levels of service requirements for each of the CoS's asset classes, methods used to measure and monitor performance.
- **Equipment, tools and materials** – how these items are applied to maintenance activities, including costing and materials management protocols.
- **Maintenance management activities** – the type and frequency of maintenance management activities performed by the various CoS departments / divisions participating in the Project, including reactive, planned and preventive maintenance strategies currently employed.
- **Maintenance personnel** – the names and roles of each maintenance staff member, including special training, certifications and crew structure.
- **Information sharing** – by and between the various departments / divisions and other internal and external stakeholders, including the types, frequencies and formats of any reports utilized.
- **Future maintenance management goals and objectives** – a discussion about what each individual staff member / user views as necessary and important in order for the planned Cityworks Implementation to be deemed a success.

This first task is focused on gathering information on CoS's divisional workflows, business processes, supporting datasets and technology solutions as they all pertain to asset and maintenance management requirements. Information gathered through the first series of sub-tasks will be utilized as the foundation for a series of implementation recommendations.

Deliverables

- Prior to facilitating on-site staff interviews, Woolpert will develop a draft RFI memorandum, as detailed above. Said memorandum will be used to facilitate staff interview discussions and discovery. Woolpert will deliver a draft of the memorandum to the CoS's Project Manager for review. Any updates required to the Memo as a result of the review meeting will be made by Woolpert's Project Manager prior to the on-site staff interviews.

Assumptions

- Please see Project Clarifications section.

Client Requirements

- None.

Sub-Task 1.1.2 | Hold Staff Interviews (on-site)

Woolpert staff will facilitate a series of group interviews with CoS staff identified by CoS's Project Manager as potential users or administrators of the planned Cityworks solution. Interviews will be conducted for the purpose of developing an implementation strategy and plan for the Cityworks CMMS. Woolpert's Project Manager and Project Director will co-facilitate a series of ten meetings over the course of two day as detailed below:

Interview Group	Duration	In Attendance
Key Management from all divisions		
Parks – Maintenance		
Administration		
Streets Division – Maintenance		
Fleet Division – Maintenance		
Facilities and Property Division – Maintenance		
Customer Response Team		

Traffic Services Division - Maintenance	3 hours	Traffic Services Supervisor and a representative for every other position related to maintenance work.
IT Support Staff		
Wrap-Up Meeting with Management	30 minutes	A representative from each division participating, Project/Executive Sponsor and CoS IT.

Deliverables

- Woolpert will facilitate interview, as detailed above. While not a formal deliverable product, Woolpert's consultant staff will document all interview notes / discussions for the purpose of supporting development of the recommendations and Implementation Plan.

Assumptions

- Appropriate CoS staff from each of the subject divisions will actively participate in the staff interviews. CoS staff interview participants will provide accurate details about their current (and desired) work processes. Copies of any information / documents that are requested by Woolpert interviewers will be provided by CoS staff in a timely manner.

Client Requirements

- All CoS staff identified to participate in interviewed must actively participate.
- Please review the In Attendance column above. Woolpert reviewed the CoS's organization chart and attempted to choose a representative position from each level of the organization, within each division participating in the assessment.

Task 1.2 | Document Existing Conditions and Make Recommendations

Documenting the results of the interviews is necessary to confirm and understand existing conditions in order to have an agreed upon project baseline. Said baseline will be used to justify the planned Cityworks implementation and will be the foundation upon which the implementation plan and recommendations are developed.

Sub-Task 1.2.1 | Document Existing Conditions (off-site)

The Existing Conditions section will be divided by division and subsections will be determined following the interviews. This section will focus on documenting Woolpert's understanding of current work order and asset management operations.

Sub-Task 1.2.2 | Review Existing Conditions and Provide Feedback - CoS-OWNED TASK

It is expect the CoS will review and provide written feedback within ten business days.

Sub-Task 1.2.3 | Incorporate Feedback on Existing Conditions (off-site)

Woolpert will update the document per feedback from CoS.

Deliverables

- Draft document with Existing Conditions
- Incorporate CoS feedback
- Final document with Existing Conditions

Assumptions

- Please see Project Clarifications section.

Client Responsibilities

- Please see Project Clarifications section.

Sub-Task 1.2.4 | Document Recommendations (off-site)

Information collected and analyzed through completion of the staff interviews will form the basis for a series of Cityworks implementation recommendations focused on automating and improving CoS's environment. Woolpert will develop a detailed list of recommendations for each of the CoS's participating divisions. Recommendations will be made in each of the following primary areas:

- CoS-wide
- IT
- Divisional

Deliverables

- Draft document with Recommendations
- Incorporate CoS feedback
- Final document with Recommendations

Assumptions

- CoS will submit feedback using track changes inside draft document.

Client Responsibilities

- Please see Project Clarifications section.

Task 1.3 | Develop Implementation Plan (off-site)

The implementation plan will consist of a full scope of services, schedule and budget that in-cludes all divisions interviewed. The implementation plan will incorporate all recommenda-tions that have been discussed and agreed to between the CoS and Woolpert.

Deliverables

- Draft Scope of Services, budget and schedule
- Incorporate CoS feedback
- Final Scope of Services, budget and schedule

Assumptions

- CoS will submit feedback using track changes inside draft document.

Client Responsibilities

- Please see Project Clarifications section.

PHASE 2 | IMPLEMENT CITYWORKS FOR STORMWATER DIVISION

Task 2.1 | Conduct Core Team Training (on-site)

Core Team Training will be comprised of a day curriculum designed to introduce the City-works maintenance / work management tools the Stormwater division.

The purpose of the Core Team Training is to provide participants (those with implementation responsibilities) with enough exposure to, and understanding of, the Cityworks maintenance / work order management functionality such that they are able to make smart and informed decisions as they relate to the overall implementation objectives. The intent of the Core Team Training is not to provide the skills needed to maintain the daily operations of the sys-tem. This End-User Training is provided at a later date. Core Team Training does not have to be facilitated in a classroom environment (computer lab or training room).

Sub-Task 2.1.1 | Prepare Training Agendas (off-site)

Woolpert's Project Manager will prepare and submit a detailed agenda of the Core Team Training to the CoS's Project Manager for review no less than three (3) days prior to the scheduled training. This agenda will outline the key components and core functionality of each product that will be addressed during the demonstration.

Sub-Task 2.1.2 | Facilitate Training (on-site)

A System Configuration Specialist will review the System Configuration Document and provide CoS an in-depth on-site overview and demonstration of the Cityworks software application:

The following application functionality, as it pertains to the CoS's responsibilities, will be demonstrated:

Work Management Functionality

Service Requests

Problem Codes	Labor
Caller / Requestor Information	Service Request Management
Submit To / Dispatch To	Service Request Reports

Work Orders

Work Order Types	Equipment
Work Order Tasks	Labor
Inspections	Work Order Management
Crews	Work Order Reports
Materials	

- GIS (Asset Inventory, Geocoding, Event Layers), and
- Customized Reporting

Deliverables

- Agenda
- Woolpert's System Configuration Specialist will facilitate on-site Core Team Training activities over one day, as specified above.

Assumptions

- Ensure staff participates in Core Team Training activities.

Client Responsibilities

- In support of the Core Team Training efforts, it shall be the CoS's responsibility to:
  - o Secure an appropriate training facility suitable for participants,
  - o Schedule and accommodate the appropriate CoS team members such that they are available, without undue interruption, for the training day.

Task 2.2 | Review Enterprise Strategy

The objective of this task is to discuss and agree on key global decisions and review Woolpert's recommended business processes to use Cityworks. Potential changes required to accommodate the Stormwater division.

Sub-Task 2.2.1 | Define Enterprise-wide Work Management Strategy (on-site)

This task will begin with a workshop to address organization-wide standards for:

Standard Work Order Types
- Woolpert and Stormwater resources will determine standard and specific work order types that apply to their division. Standard work order types will be used to track general asset activities that do not require any specific details other than tracking labor, material and equipment against a specific asset or set of assets.

Common Enterprise Business Strategies
- Key performance measures and metrics that need to be captured division-wide.