



Statement of Work

City of Port St. Lucie, FL

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OpenGov Statement of Work

1. **Project Scope and Understanding**

This Statement of Work (“SOW”) outlines the Professional Services OpenGov will provide to City of Port St. Lucie, FL (“Customer”) under the applicable Order Form. Professional Services or technical requirements not listed in this SOW are out of scope.

2. **Exhibits**

The following exhibits are incorporated by reference and are part of this SOW:

- 2.1. Exhibit 1: Implementation Activities
 - 2.1.1. Government App Builder - Capital Budget & Project Management
- 2.2. Exhibit 2: Technical Requirements
 - 2.2.1. Government App Builder

3. **OpenGov Responsibilities**

OpenGov will provide a framework for planning, communication, progress tracking, and coordination for activities in Exhibit 1. In collaboration with Customer, OpenGov will develop and maintain the Project Plan. The “Project Plan” is a detailed, living document that defines how the project will be executed, including tasks, timelines, milestones, and team assignments. OpenGov will monitor progress against the Project Plan, coordinate adjustments to tasks and schedules as needed, and conduct status meetings as agreed to by the parties. OpenGov will provide weekly status reports, a Project Charter, and a RAID register (Risks, Actions, Issues, and Decisions). The “Project Charter” is a high-level document outlining the project’s purpose, goals, key stakeholders, success criteria, and major milestones.

4. **Customer Responsibilities**

The Customer will appoint a primary point of contact with authority to make binding decisions (“Customer’s Project Manager”). This person will coordinate internal resources, assign subject matter experts (“SMEs”), and oversee implementation. Responsibilities include attending status meetings, making timely decisions, providing requested information, escalating issues internally, and collaborating on the Project Plan and Change Order process, if applicable.

Customer acknowledges that the success of this project is contingent on its full participation. Customer must provide data within ten (10) business days of a request, maintain consistent data formats and access throughout the project, and allocate the necessary Customer resources and time to support deliverables and meet agreed-upon timelines.

Any failure by Customer to meet its responsibilities under this SOW (each, a “Customer Delay”) will automatically suspend the affected obligations of OpenGov

for the duration of the Customer Delay and for a reasonable restart period thereafter. All affected milestones, delivery dates, and service-level commitments will be extended on a day-for-day basis (or as otherwise reasonably necessary) to account for the Customer Delay, and may result in an adjustment of the fees if OpenGov incurs additional time, materials, or other costs as a result. Under no circumstances will any consequence of a Customer Delay constitute a breach by OpenGov of this SOW or of the Agreement, nor will OpenGov be liable for any failure to meet a performance obligation that is caused, in whole or in part, by a Customer Delay.

5. Project Delivery

OpenGov will perform services under this SOW remotely. OpenGov may use a combination of OpenGov personnel and OpenGov-trained implementation partners to deliver the services described in this SOW.

6. Estimated Schedule

The specific timeline, including order of delivery of the product(s), will be determined during the project planning activities in the Initiate Phase. Services are estimated to begin within two (2) weeks and no later than four (4) weeks from contract signature. OpenGov reserves the right to adjust the schedule based on the availability of Customer or OpenGov resources, and the timeliness of deliverables provided by the Customer.

7. Acceptance Procedure

OpenGov will submit completed deliverables to the Customer's Project Manager for review. Within five (5) business days of receipt, the Customer's Project Manager will either provide written acceptance or a list of requested revisions. In the event there are requested revisions, the subsequent review period for acceptance will follow the same timeline until final acceptance. If Customer does not respond within this period, the deliverable will be deemed accepted. Once a deliverable is accepted, any requested changes will require a paid Change Order.

Acceptance milestones and review timelines will be tracked in the Project Plan. Both parties acknowledge that delays in task completion or unresolved issues may impact the project timeline. If OpenGov determines in good faith that Customer is not fulfilling its responsibilities under this SOW, OpenGov may place services on hold following a minimum of five (5) business days' written notice. The notice will specify the actions needed to progress the project. During the hold period, OpenGov may reallocate resources without penalty and will not be responsible for resulting delays.

8. Modifications

The fees and estimated timeline are based on the scope and assumptions in this SOW. If either party determines that a change to the scope is necessary, the parties

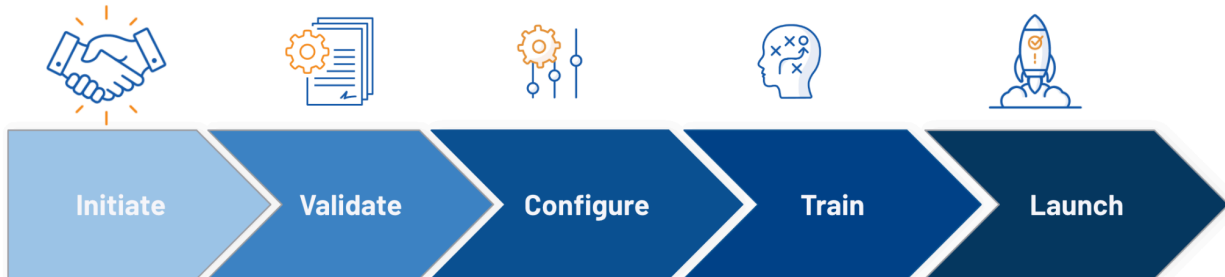
will collaborate to define the required modification, which may result in fee adjustments based on OpenGov's standard rates. All modifications must be documented in a written Change Order and signed by both parties ("Change Order"). Examples of changes include revisions to the project timeline, deliverables, or resource allocation.

9. Communication and Escalation Procedure

OpenGov and Customer agree to maintain regular communication in alignment with the Project Plan to ensure progress, resolve questions promptly, and minimize risk. Both parties will raise any issues or concerns in a timely manner. If challenges are not resolved through standard project discussions, Customer and OpenGov Project Managers will escalate to their respective executive leadership teams to jointly determine a resolution and align on a path to successful implementation.

Exhibit 1: Implementation Activities

OpenGov Implementation Methodology Overview



Every OpenGov implementation follows a five-phase hybrid methodology designed to ensure a structured and collaborative deployment. The phases are:

1. Initiate – OpenGov provisions access and performs initial system setup.
2. Validate – OpenGov works with the Customer to confirm requirements and review initial configurations.
3. Configure – OpenGov completes system configuration as outlined in this SOW.
4. Train – OpenGov provides training to system administrators and/or end users, as applicable.
5. Launch – OpenGov provides post-go-live support and transitions the Customer to OpenGov’s Customer Success Team.

Each implementation is structured around these phases. Deliverables, sign-offs, and completion criteria are aligned to the relevant phase.

Capital Budget & Project Management

Project Oversight

Overview

Provide strategic coordination and day-to-day project management to maintain scope, quality, and schedule across all workstreams.

OpenGov Responsibilities

- Assign a dedicated Project Manager; maintain RAID log; lead status cadence; coordinate OpenGov and City tasks; manage decision/approval checkpoints; surface risks and mitigation.

Customer Responsibilities

- Assign a City PM; ensure SME participation; review weekly updates; make timely decisions; escalate blockers.

Boundaries & Assumptions

- Remote delivery by default; City provides access to required systems and stakeholders.

Completion Criteria

- Project artifacts current; milestones achieved; formal closeout completed.
-

Initiate

Overview

Kickoff; environment provisioning; role mapping; initial backlog; project governance and shared workspace setup.

OpenGov Responsibilities

- Conduct kickoff; provision GAB tenant; configure initial roles; establish collaboration hub; draft initial configuration backlog and plan.

Customer Responsibilities

- Confirm project team and decision owners; validate access; provide branding, org/department structure, and initial process documents (intake forms, CO/SOV templates, compliance and invoice approval workflows).

Boundaries & Assumptions

- City supplies user list and security roles within five (5) business days of request.

Completion Criteria

- Access confirmed; governance and plan baselined; configuration backlog approved to move to Validate.
-

Validate

Overview

Structured checkpoint to confirm scope, data sources, integration methods, and acceptance criteria; finalize sprint plan.

OpenGov Responsibilities

- Facilitate working sessions; confirm data model and import strategy; finalize integration approach (API vs. file); define reporting inventory; lock initial sprint backlog.

Customer Responsibilities

- Provide sample datasets (CIP inventory, project budgets, funding sources, procurement contracts, invoices, CO/SOV examples), approval matrices, and compliance checklists; confirm integration contacts for Procurement, EAM/Cartograph, Budget/ERP, GIS, and (optionally) permitting.

Boundaries & Assumptions

- Additional requirements identified here may require change order.

Completion Criteria

- Solution blueprint approved; readiness confirmed; begin Configure.
-

Configure

CIP Intake & Prioritization

Overview

Standardize multi-department project intake, scoring, and portfolio selection.

OpenGov Responsibilities

- Build intake forms; configure scoring criteria and weights; enable cross-department routing and approvals; set portfolio views and summaries.

Customer Responsibilities

- Provide scoring rubric and approval roles; supply sample intakes; validate workflows.

Boundaries & Assumptions

- Up to 4 unique intake forms.

Completion Criteria

- Intake and scoring live with role-based access and approval flow validated.
-

Capital Budget & Funding Model

Overview

Support 5-15 year planning; map projects to multiple funding sources (local, bonds, grants) with controls.

OpenGov Responsibilities

- Configure funding source tables; allocation rules; multi-year planning views; import baseline capital plan; set debt/bond linkages where provided.

Customer Responsibilities

- Provide funding catalogs and business rules; supply baseline CIP plan; confirm budget rollup logic.

Boundaries & Assumptions

- ERP integration limited to agreed export/import or API endpoints; complex debt modeling is out of scope.

Completion Criteria

- Multi-year plan and allocations visible; validations in place; baseline loaded.
-

Project Scheduling & Milestones

Overview

Provide project timelines with Gantt, dependencies, milestones, and task ownership.

OpenGov Responsibilities

- Configure schedule objects; milestone templates by project type; task assignments and notifications; import one schedule per pilot project; enable calendar views.

Customer Responsibilities

- Provide milestone templates and task owners; validate dependencies; maintain dates once live.

Boundaries & Assumptions

- External scheduling tools (e.g., MS Project/Primavera) integrations are not included.

Completion Criteria

- Schedules functional; notifications working; sample schedules validated.
-

Spend & Approval Management

Overview

Route and track encumbrances, pay apps/invoices, and budget drawdowns against allocations.

OpenGov Responsibilities

- Configure approval workflows by amount/fund/dept; set pre-check controls; map to chart segments and FAW logic where applicable; enable dashboards for available vs. encumbered vs. invoiced.

Customer Responsibilities

- Provide approval matrices, account structures, FAW or equivalent, and sample invoices; identify exception paths.

Boundaries & Assumptions

- Real-time actuals feed depends on ERP connectivity; otherwise imports will be scheduled.

Completion Criteria

- Requests route correctly; drawdown and variance dashboards reflect configured data.
-

Contracts, Change Orders & Schedule of Values (SOV)

Overview

Centralize vendor contracts, amendments, SOV line items, and change order approvals.

OpenGov Responsibilities

- Configure contract objects; SOV structure; CO request/approval workflow; versioning and audit trail; import a pilot contract record with SOV; link to Procurement vendor records where available.

Customer Responsibilities

- Provide contract and SOV templates; CO thresholds and approvers; sample historical records.

Boundaries & Assumptions

- No external contractor portal; attachments stored as documents; Bluebeam/Adobe remain for mark-ups.

Completion Criteria

- Contracts/SOV/CO workflows live; audit logs and document links validated.
-

Compliance & Document Control

Overview

Embed compliance checklists and evidence capture for labor standards, environmental, and grant conditions.

OpenGov Responsibilities

- Configure checklist templates (Davis-Bacon/prevaling wage, Section 3, environmental review, Buy America as applicable); enable attestations and file capture; set assignment and reminders; produce compliance reports.

Customer Responsibilities

- Supply policy/checklist content; define evidence standards and retention; identify compliance reviewers.

Boundaries & Assumptions

- Native certified payroll ingestion not included; evidence captured as documents.

Completion Criteria

- Checklists live; assignments and reminders operating; sample compliance package produced.
-

Reporting & Dashboards

Overview

Deliver portfolio, finance, schedule, and compliance dashboards for executives and PMs; prepare optional public view.

OpenGov Responsibilities

- Configure role-based dashboards (executive, portfolio, department, PM); build standard reports (table/summary/chart/map/calendar); enable exports.

Customer Responsibilities

- Prioritize KPIs; validate layout and filter logic; identify public-facing content (if Option D selected).

Boundaries & Assumptions

- Up to 5 internal dashboards and 20 KPI reports included in core.

Completion Criteria

- Dashboards and reports approved; export formats verified.

Integrations

OpenGov Procurement (Pro)

Overview

Link projects to awarded contracts/vendors; import contract metadata; support intake continuity where applicable.

OpenGov Responsibilities

- Map fields; establish record links; schedule import/API as available; test and document flows.

Customer Responsibilities

- Provide field mappings and sample award data; coordinate access with system admin.

Boundaries & Assumptions

- Data exchange limited to agreed objects/fields; changes in Pro configuration may require mapping updates.

Completion Criteria

- Linked records present; sync job(s) successful; reconciliation test passed.

OpenGov EAM

Overview

Surface asset/work order context for capital projects; enable reference from projects to assets.

OpenGov Responsibilities

- Configure project↔asset link fields; import reference lists; provide links to work orders.

Customer Responsibilities

- Provide asset IDs and crosswalks; confirm linkage rules by project type.

Boundaries & Assumptions

- Core delivery includes reference linking; bi-directional work order sync in Option C.

Completion Criteria

- Asset references visible on projects; sampled links validated.

Budget/ERP (budget & actuals exchange)

Overview

Exchange budget/actuals to support controls and reporting.

OpenGov Responsibilities

- Configure imports/exports; schedule jobs; validate totals against source reports.

Customer Responsibilities

- Provide data extracts or API access; confirm reconciliation rules.

Boundaries & Assumptions

- One inbound actuals feed and one outbound budget/encumbrance export included.

Completion Criteria

- Periodic loads successful; reconciliation report accepted.

GIS/Esri Map Overlays

Overview

Display project footprints and right-of-way impacts; support coordination with permitting.

OpenGov Responsibilities

- Configure map layers and project geometry fields; set up read-only Esri services; enable filterable map views.

Customer Responsibilities

- Provide authoritative map services; maintain layer availability.

Boundaries & Assumptions

- Read-only overlays in core; editing geometries requires additional scope.

Completion Criteria

- Map views render correctly; sample layer filters approved.

Data Migration

Overview

Seed the system with **active**: projects, funding sources, and key contracts for continuity (up to twenty five (25) projects).

OpenGov Responsibilities

- Provide import templates; perform field mapping; run one test load + one final load; deliver record counts and variance report.

Customer Responsibilities

- Prepare clean datasets; validate sample; approve final import.

Boundaries & Assumptions

- Data cleansing is a City responsibility; additional iterations charged separately.

Completion Criteria

- Data visible and validated; variance report signed off.
-

Train

Overview

Role-based enablement for admins, PMs, finance, and department contributors.

OpenGov Responsibilities

- Deliver admin training (forms, workflows, reports, permissions); deliver end-user training for PMs/approvers; provide recordings and quick-start guides.

Customer Responsibilities

- Ensure attendance; complete practice scenarios; confirm readiness.

Boundaries & Assumptions

- Remote delivery; two waves included (admins; end users).

Completion Criteria

- Training completed; admins and users can perform core tasks; readiness confirmed.
-

Launch

Overview

Hypercure support during go-live and transition to Customer Success.

OpenGov Responsibilities

- Monitor system; resolve early-life issues; conduct post-launch review; transition to Customer Success.

Customer Responsibilities

- Report issues; participate in review; sign Solution Acceptance.

Boundaries & Assumptions

- Hypercare is time-boxed per LOE; subsequent requests move to support/success.

Completion Criteria

- Go-live complete; known issues addressed or queued; acceptance signed.

Exhibit 2: Technical Requirements

Government App Builder Technical Requirements

- Migration
 - All data must be accessible to OpenGov in Excel or CSV format
 - Maximum historical record count: 500
- Flat File Integrations
 - Customer must
 - Provide OpenGov with the export file (a delimited file) from the external system
 - Automate the export and/or import of data into and out of the external system.
- API Integrations
 - Customer is responsible for:
 - Fees associated with purchasing the external system
 - Providing OpenGov with access to the API and/or access to technical staff from that vendor.
 - Access to a test instance of the third party API including a URL, authentication credentials, and relevant documentation.
 - Changes to scope resulting from a change in the third-party vendor's API.
 - Testing expected workflows and data in both test and production environments
 - To display a location on a map, the third party system must be able to provide location data via their API, as shapes or coordinates. Text addresses are limited to populating address fields.

