



"A City for All Ages"

CITY OF PORT ST. LUCIE
UTILITY SYSTEMS DEPARTMENT
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Brad E. Macek, Director

TO: ROBYN HOLDER, PROCUREMENT MANAGER
FROM: BRAD E. MACEK, UTILITY SYSTEMS DIRECTOR
SUBJECT: WOOLPERT CITYWORKS BACKGROUND
DATE: MAY 6, 2021

On August 12, 2019, City Council approved the participation in the GSA Contract #GS-35F-0425P for the implementation, configuration, testing and training of the Azteca Cityworks software with Woolpert, Inc. to provide the onsite call center, field crews and administration personnel for a 24/7 paperless work order system, with reporting features to provide staff budgeting usage and plan for a predictive infrastructure asset replacement.

During the project, additional services have been identified and are needed to move forward with Cityworks implementation.

The Utility Information Systems Department is requesting an addendum to the Woolpert/Cityworks contract in the amount of \$56,712.00 to provide additional support services for the integration between the Cityworks AMS and CIS Infinity by Advanced Utility Systems (AUS), additional support services for the Data Conversion of Legacy Data Sets and Project Management support services. This functionality will allow Connection Support staff to use its CIS customer support/billing software to push work orders from CIS to Cityworks.

Staff has reviewed the Professional Service Agreement Addendum submitted by Woolpert, Inc. and find that they meet the needs of the City.

Funds are appropriated in the Utility Operating Fund/Mapping/Software (#431-1360-552201-00000).

Please contact me for any questions.

Professional Service Agreement Addendum No. 2

ADDENDUM TO WOOLPERT AGREEMENT

Woolpert Project No. 80114

This Addendum No. 2 is attached to and made part of the Professional Service Agreement – Cityworks AMS Implementation dated 15 August 2019, as executed by and between Woolpert, Inc. (Woolpert) and City of Port St. Lucie Florida (Client). In accordance with the change provisions of the Professional Service Agreement – Cityworks AMS Implementation, the following modifications are identified and made, and become effective as of the latest signature date below.

- This addendum adds to the scope of services:
 - additional support services for the integration between the Cityworks AMS and CIS Infinity by Advanced Utility Systems (AUS)
 - additional support services for the Data Conversion of Legacy Data Sets
 - additional Project Management support services
- Services will be provided as a Fixed-Fee, Lump-Sum cost.

Attachments include the following:

- Attachment A: Additional Services
- Attachment B: Compensation

The parties agree to amend the Professional Service Agreement – Cityworks AMS Implementation by way of this Addendum No. 2, as shown above and/or attached hereto. *Except as expressly contained and amended herein, all other terms, agreements and conditions, as contained and set forth in the Professional Service Agreement – Cityworks AMS Implementation are hereby affirmed and ratified.*

IN WITNESS WHEREOF, this Agreement is accepted as of the date first written above.

City of Port St. Lucie, Florida (Client):

Signed: _____

Name: Brad Macek

Title: Utility Director

Date: 12/08/2020

WOOLPERT, INC. (Woolpert):

Signed: _____

Name: John Cestnick

Title: Senior Associate, Project Manager

Date: 2020-12-17

Services and/or Work intended to be modified by this Addendum will only commence upon the full execution of this Addendum, and when returned to the above identified Woolpert personnel.



Attachment A: Additional Services

Background

During the project the City has been undecided on the desired approach for integrating Cityworks with Advanced Utility Systems (AUS) CIS software. To come to a final decision there has been numerous meetings, discussions, and project delays, inevitably resulting in the project going on a full hold in mid-August 2020 with no substantial progress having been made since March 2020. Now that the City has made a final decision on the integration's direction and the desired functionality, Woolpert is able to outline the necessary additional support services to re-start the project, including having to re-do some of the already in-progress services. In general, the additional support services being added to the scope of services include:

- Sub-Task 3.1.2 (Additional): Facilitate Application Integration Discovery Workshops
- Sub-Task 3.1.3 (Additional): Develop Application Integration Software Specifications
- Task 3.2 (Additional): Perform Data Conversion of Legacy Data Sets
- Project Management

Sub-Task 3.1.2A (Additional): CIS Integration Discovery Workshops

To accurately and properly define the desired functionality of the integration between Cityworks and Advanced Utility Systems (AUS) CIS Infinity, Woolpert will need to facilitate additional workshops with the Client. Woolpert will facilitate a series of remote workshops over the period of three (3) consecutive weeks to further investigate the required functionality; confirm the technical and functional requirements; and to begin mapping the application business process and data flow diagrams. Agenda discussion items are expected to include the following:

1. GIS requirements for integration support
2. Meter assets - system of record
3. Meters - asset lifecycle within GIS and CIS
4. Service Points - Feature Class lifecycle and Client workflows
5. For meters:
 - a. Work order templates and field mappings
 - b. GIS schema; CIS account numbers; unique ID's
 - c. CIS data requirements
 - d. Asset lifecycle/maintenance process; sync with CIS
 - e. Cityworks work orders - equipment changeout workflows
 - f. Canceling work orders from CIS to Cityworks
6. Discuss Cityworks / CIS Mobile sync (assuming work orders configured such that they cannot be worked in both systems)
 - a. Update work order from CIS to Cityworks
 - b. Close work order from CIS to Cityworks

The results of these workshops will provide the necessary information to define the development of the Software Requirements Specifications (SRS), then in turn define the development of the system integration between Cityworks AMS and CIS Infinity by AUS.

Related sub-tasks are as follows:

WBS	Task Name
3.1.2A	ADDITIONAL: CIS Integration Discovery Workshops
3.1.2A.1	Woolpert to Review Previously Developed Project Notes and Documentation
3.1.2A.3	Woolpert to Prepare for Workshops
3.1.2A.2	Application Integration Discovery Workshops (Conf Call)
3.1.2A.2.14	Discovery Workshop #1 (Conf Call)
3.1.2A.2.13	Discovery Workshop #2 (Conf Call)
3.1.2A.2.17	Discovery Workshop #3 (Conf Call)
3.1.2A.2.11	Discovery Workshop #4 (Conf Call)
3.1.2A.2.10	Discovery Workshop #5 (Conf Call)

WBS	Task Name
3.1.2A.2.9	Discovery Workshop #6 (Conf Call)

Deliverables

- Facilitate remote discovery workshops to define the system integration requirements.

Assumptions

- Remote workshops are expected to last no longer than four (4) hours.
- Remote workshops will be limited to a total of twenty-four (24) hours in duration.
- Client IT support and business unit staff familiar with the technical and functional requirements will be available.
- All necessary Client staff will be available during the requirements workshops and throughout development.
- Integration functionality will only include those for meter assets.

Client Responsibilities

- Coordinate and schedule Client workshop participants.

Sub-Task 3.1.3A (Additional): Develop CIS Integration Software Specifications

Based on the information gathered during the integration workshops in Sub-Task 3.1.2, Woolpert will draft a Software Requirements Specification (SRS) for the integration between Cityworks AMS and CIS Infinity by AUS. The SRS document will provide:

- A vision for the application integration.
- High-level system architecture diagrams.
- Assumptions learned.
- Data mapping tables.
- Lists of functionality requirements and their priorities.
- Application workflows.
- Integration requirements -- this section will further expand upon the functional and technical requirements.
- Use case narratives (where applicable or as needed).

Once the draft SRS document has been developed, Woolpert will submit it to the Client project manager for review and comment. Woolpert will then facilitate a remote review meeting with Client IT team members to discuss the findings of their review, address their comments, and make adjustments where necessary. Woolpert will then update the SRS document and submit the final version to the Client project manager for approval and acceptance.

For an integration between Cityworks AMS and CIS Infinity, the interface to Cityworks would be a combination of Cityworks APIs where possible, and Woolpert custom APIs where necessary.

Related sub-tasks are as follows:

WBS	Task Name
3.1.3A	ADDITIONAL: Develop CIS Integration Software Specifications
3.1.3A.1	Woolpert to Develop Draft Software Requirements Specifications (SRS)
3.1.3A.2	Woolpert to Submit Draft SRS Documentation to Client PM
3.1.3A.3	Client Technical Team to Review Draft SRS Documentation and Coordinate Review with Advanced (Client-Owned Task)
3.1.3A.4	Woolpert to Facilitate Remote Review Meeting with Client Technical Team and Advanced (Conf Call)
3.1.3A.5	Woolpert to Update Draft SRS Documentation per Client Review Comments & Coordinate with Advanced
3.1.3A.6	Woolpert to Submit Updated SRS Documentation to Client PM

Deliverables

- One draft and final SRS document.
- A conference call review meeting, lasting up to two (2) hours in duration, with Client team members to address review comments.

Assumptions

- The Client project manager and IT team will review the draft document and submit comments back to Woolpert within five business days of receipt.
- This scope of services, and this integration between Cityworks AMS and CIS Infinity by AUS, is expected to perform the following workflows for meter assets only:
 - CIS to Cityworks – create service request from service order
 - CIS to Cityworks – cancel service request
 - Cityworks to CIS – update service order status from service request
 - Cityworks to CIS – close service order from service request

 - CIS to Cityworks – create work order from service order
 - CIS to Cityworks – cancel work order
 - CIS to Cityworks – update work order (CIS mobile types only)
 - CIS to Cityworks – close work order (CIS mobile types only)

 - Cityworks to CIS – update service order status from work order
 - Cityworks to CIS – cancel service order from work order
 - Cityworks to CIS – close service order from work order
 - Cityworks to CIS – create service order from work order

 - CIS to GIS – Add New Meter (data such as meter serial number, size, register type, manufacturer)
 - CIS to GIS – Update Meter (data such as lifecycle status)
- CIS Infinity v4 has documented interface capabilities (interface tables, or web APIs) that support the necessary data exchange. That includes information between Cityworks and CIS; and information about the meter inventory in CIS to support the workflows from CIS to GIS.
- THE FOLLOWING FUNCTIONALITY IS NOT INCLUDED WITHIN THIS SCOPE OF SERVICES
 - CIS to GIS integrations beyond original scope of syncing Meter records.
 - Ability to manually link records between each system. This functionality will not be necessary since records will automatically be linked across systems.
 - Integration to push customer information, and to maintain historical records within Cityworks. Customer information will be sent with each Work Order or Service Request but will not be maintained in separate customer table.
- During requirements meetings, the requirements and technical specifications defined in this scope will be refined and possibly changed. It is expected that the changes will not represent a significant difference in the total level of effort required; however, if they do, Woolpert and Client will work together to determine what can be performed within the existing scope, and determining options for addressing anything that exceeds the scope of services.
- Client will be responsible for changes or updates to the GIS schema and data, if any are determined to be necessary to support the integration and configuring and managing the necessary ArcGIS Server map services.
- Any necessary Cityworks configuration to support the integration will be coordinated with and performed during the system design and configuration tasks.
- GIS schema relating to Meters will involve a service connection point (spatial), which may have one or more Meters (nonspatial) associated to it.
- Woolpert has budgeted a minimal amount for basic general coordination and communication with Advanced Utility Systems, with the assumption that Advanced Utility Systems and the Client will be testing all configuration and integration components of CIS Infinity software. **Should for any reason Woolpert need to assist with testing or trouble shooting integration functionality for CIS Infinity software, Woolpert will only do so after written approval by the Client is received allowing Woolpert to bill the Client on a time and material basis as defined within Addendum #1 of this agreement.**

Client Responsibilities

- Client is responsible for any necessary communication and coordination with Advanced Utility Systems. This includes any necessary configuration of CIS Infinity if required in order to effectively support the system integrations.
- Client is responsible for working with Advanced Utility Systems to ensure that any configuration and customization necessary to support the integration is tested by Advanced Utility Systems. Client will provide evidence of successful testing prior to joint system integration testing.

- Client will coordinate with Advanced Utility Systems for support during testing (ECT and IAT).
- Client will license the necessary Cityworks APIs (Work Order and Service Request API) and CIS Infinity API's as required.
- Review submitted draft documents.

Sub Task 3.2A (Additional): Facilitate Data Conversion Workshops for SEMS Legacy Data Sets

Due to the significant and extended delays in the project schedule, it will be necessary for additional remote data migration workshops to finalize and document the requirements of the data conversion activities. Prior to the workshop discussions Woolpert will review: documented task items; past email communications; project notes, and; meeting audio recordings (if available). Woolpert will then facilitate no more than five (5) remote workshops to gather additional data conversion requirements.

As defined in the original scope of work under Task 3.2, Woolpert will document the workshop findings in the form of a data conversion plan and submit a draft to the Client project manager for review. Upon the Client's completed review of the draft plan, Woolpert will facilitate a remote review meeting to address the comments. Woolpert will then update the data conversion plan and provide a copy to the Client project manager.

Related sub-tasks are as follows:

WBS	Task Name
3.2.A	ADDITIONAL Data Discovery Workshops
3.2.A.1	Data Migration Workshop#1 (Conf Call)
3.2.A.2	Data Migration Workshop#2 (Conf Call)
3.2.A.3	Data Migration Workshop#3 (Conf Call)
3.2.A.4	Data Migration Workshop#4 (Conf Call)
3.2.A.5	Data Migration Workshop#5 (Conf Call)

Deliverables

- Woolpert will facilitate up to five (5) additional remote data migration workshops

Assumptions

- Each workshop will last no longer than two (2) hours

Client Responsibilities

- Attend each of the data migration workshops

Attachment B: Compensation

The additional services provided through this addendum will be billed as a Fixed-Fee, Lump-Sum amount of Fifty-Six Thousand Seven Hundred and Twelve Dollars (\$56,712), billed as a percentage complete on a period no more often than monthly as defined in the Professional Service Agreement - Cityworks AMS Implementation, dated 15 August, 2019. This amount is in addition to the already contracted services as shown below.

WBS	Task	Total Fee
PM	PROJECT MANAGEMENT	\$50,225.00
Phase 1	IMPLEMENTATION PLANNING	
1.1	Pre-Planning Discovery	\$17,270.00
1.2	Install and Configure AMS Software	\$5,265.00
1.3	Provide Software Demonstrations	\$4,220.00
1.4	Conduct Business Process Reviews	\$15,635.00
1.5	Phase 1 Quality Control	\$2,119.00
Phase 2	CORE SYSTEM DEVELOPMENT	
2.1	Prepare Draft Configuration Documentation	\$1,600.00
2.2	Provide Asset Management System Configuration Training	\$1,765.00
2.3	Facilitate Core Cityworks AMS Configuration	\$74,920.00
2.4	Facilitate Inventory & Materials Management Config	\$23,760.00
2.5	Facilitate AM Software - CCTV Integration Config	\$10,170.00
2.6	Provide AM Software Demonstrations	\$4,480.00
2.7	Review and Approval of Updated System Configuration and Documentation	\$2,110.00
2.8	Phase 2 Quality Control	\$5,940.00
Phase 3	ADVANCED FUNCTIONALITY	
3.1	Develop Application Interfaces	\$111,230.00
3.2	Perform Data Conversion of Legacy Data Sets	\$30,990.00
3.3	Develop Custom Reports and Dashboards	\$24,350.00
3.4	Develop and Deploy Mobile Asset Management Solutions	\$22,230.00
3.5	Phase 3 Quality Control	\$9,440.00
Phase 4	SYSTEM DEPLOYMENT	
4.1	Develop Test Plan	\$15,500.00
4.2	Provide Tester Training	\$9,545.00
4.3	User Acceptance Testing in Development Environment	\$6,210.00
4.4	Provide End User Training	\$28,320.00
4.5	Provide Go-Live Support	\$26,290.00
4.6	Phase 4 Quality Control	\$4,293.00
Addendum #1: Time and Material Charges		
I&M	Not To Exceed authorized in Addendum #1	\$50,000.00
Addendum #2: Additional System Integration Services		
3.1.2A		
3.1.3A	Additional Support Services for Application Interface with CIS, Data Conversion of	\$56,712.00
3.2A	SEMS legacy Data Sets, and Project Management	
PM		
TOTAL INVOICE AMOUNT		\$614,589.00