

# 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. Enterprise Asset Management

### 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.

## 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 suite(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").

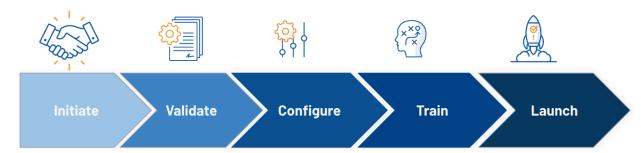
Examples of changes include revisions to the project timeline, deliverables, or resource allocation.

## 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 standardized five-phase 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.

# **Enterprise Asset Management**

Use Cases Build for Enterprise Asset Management:

- Parks and Rec
- Facilities

## OpenGov Enterprise Asset Management

# **Initiate**

OpenGov will:

 Setup a hosted sandbox and a hosted production OpenGov Asset Management environment, if one does not already exist • Conduct one (1) remote session to review customer assets (see asset section below), source data, GIS capabilities, ESRI authentication, and single sign on identity provider (if applicable).

#### OpenGov Assumptions:

 OpenGov assumes that the customer is responsible for performing quality control measures on its data in FAM.

### Completion Criteria:

• The project kicked off with an initial project timeline delivered.

## **Validate**

#### OpenGov will:

- Provide a remote, up to four (4) hours, validation workshop to increase our understanding of Customer business and functional goals. Through workshops and interviews, OpenGov will identify best fit scenarios for OpenGov Asset Management and provide a brief including any challenges as well as recommendations for OpenGov Asset Management best practices relevant to Customer implementation.
- Provide a template file to be utilized by Customer staff to populate resources, libraries, and users/roles data that OpenGov will import into OpenGov Enterprise Asset Management.
- Provide up to two (2) remote sessions for Customer technical GIS staff to configure Esri Feature Services for the bidirectional GIS integration and authentication.

#### Completion Criteria:

• Completion of requirements gathering workshop.

# **Configure**

## Configurations

### OpenGov will:

- Provide configuration services, including:
  - o Up to ten (10) custom fields and up to two (2) custom layouts per asset type listed in the Assets section below
  - o Up to thirty (30) custom fields and up to ten (10) custom layouts to be utilized in any of the shared areas of the system, such as Tasks
  - o Up to twenty (20) automations
  - o Up to twenty (20) preventative maintenance plans
- Playground Guardian
  - o OpenGov will provide the following additional configuration services for use in playground-related workflows:
    - Up to thirty (30) custom fields and up to two (2) custom layouts
    - Up to two (2) automations
    - Up to one (1) custom reports

#### OpenGov Assumptions:

 Implementation of any custom modification developed by OpenGov; your internal staff; or any third-party is not included in the scope of this project unless specifically listed above.

#### **Data Services**

#### OpenGov will:

- Provide one sandbox and one production data load service through standard import/export functionality. OpenGov will provide template documents for data population. Once populated by Customer staff, OpenGov will load the data into Customer sandbox or production OpenGov Asset Management environment. Data loads may include data such as:
  - o Parent level asset records
  - o Asset location (spatial x/y) attributes
  - o Parent level resource (Labor, Equipment Material, Vendor) records
  - o Resource Rate (Labor, Equipment, Material) records
  - o Standard system libraries

#### OpenGov Assumptions:

- OpenGov assumes that the customer is responsible for performing quality control measures on its data in EAM.
- Data conversion services from other software system(s) or sources (including Navigator databases) are not included in the scope of this project unless specifically listed above.

#### Assets

## OpenGov will:

- Provide installation and training on the following asset types:
  - o Parks and Recreation (10)
    - Athletic Space; Fence; Park; Park Structure; Playground Equipment;
       Bench; Landscape Area; Park Amenity; Playground; Tree
  - o Facilities (25)
    - Facility; Other Site Construction; Selective Building Demolition; Site Improvement; Site Preparation; Facility Floor; Basement Construction; Conveying; Exterior Enclosures; Facility Electrical; Facility Equipment; Fire Protection; Foundations; Furnishings; HVAC; Interior Construction; Interior Finishes; Plumbing; Roofing; Site Electrical Utilities; Site Mechanical Utilities; Spaces; Special Construction; Stairs; Superstructure

#### Completion Criteria:

• Customer sign-off on ability to login and access to the sandbox.

## **Train**

## Foundational Training

- Provide remote train-the-trainer training, up to two (2) hours, on overall system navigation and functionality to help familiarize Customer staff with the software environment and its common functions. Training topics include:
  - o Dashboards
  - o Standard KPI/ROI Gadgets
  - o Logins/Permission
  - o Layers
  - o Filters
  - o Maps
  - o Grids
  - o System Navigation
  - o Views (List & Detail)
  - o Standard Reports
  - o Attachments
  - o Requests, Work, Assets, Resources, Reports, and Administrator Tabs

#### OpenGov assumptions:

 OpenGov assumes that the customer is responsible for testing its workflows, automations, integrations, and configurations within the EAM and will update the configurations as part of its testing and training activities.

## Train the Trainer Training Event

- Provide a remote, up to sixteen (16) hours, "train-the-trainer" training event. The
  training agenda will be defined and agreed upon by both OpenGov and Customer
  project manager. To avoid redundancy, and to utilize service time efficiently,
  training may cover a subset of the assets listed in the Asset section of the scope.
  Topics may include any of the following:
  - o Request Management:
    - Requests
    - Requesters
    - Task Creation from Requests
    - Issue library (including settings such as Applies to Asset and Non-Location)
    - OpenGov recommended best practices for Request and Requester Management
  - o Work Management:
    - Create Task(s)(Asset/Non-Asset)
    - Assignments (Add, Edit, Remove)
    - Task Menu Actions
    - Related Work Items
    - Create Work Order
    - Associate Task to WO

- Repeat Work Orders
- Work Order Menu Actions
- Enter Resources
- Timesheets
- Activity library (including settings such as Applies to Asset, Inspection, Key Dates, Cost, and Productivity)
- OpenGov recommended best practices for Work Management
- o Asset Management:
  - Asset Details
  - Preventative Maintenance Plans
  - Inspections
  - Linked assets (if applicable)
  - Container/Component Relationships (if applicable)
  - OpenGov recommended best practices for Asset Management
- o Resource Management:
  - Resource Details
  - Labor/Equipment Rates
  - Material Management (Stock, Usage, Adjustments)
  - Vendor Price Ouotes
  - OpenGov recommended best practices for Resource Management
- o OpenGov Mobile:
  - Overall system functionality (Navigation, Interface, Maps, Attachments, Sorting)
  - Work Management
    - Create and Update Tasks (Asset/Non-Asset)
    - Assign Tasks
    - Enter Resources
    - Inspections
  - Asset Management
    - Create and Update Assets
  - Request Management
    - View and Update Requests
    - View Requester information
    - Create Task from Request
  - OpenGov recommended best practices for mobile device use
- o Administrator:
  - Administrator:
    - User Administration, Role Administration, Asset Administration, Record Filter Administration, Import/Export, Scheduled Process Log, Error Log
  - Settings:
    - System Settings, Map Administration, Geocode Settings, GIS Integration settings, Asset Color Manager
  - Manager:

- Layout Manager, Library Manager, Preventative Maintenance, Asset Condition Manager, Notification Manager, Structure Manager, Automation
- Manager

## Core Training:

- Provide remote train-the-trainer training, up to two (2) sessions on OpenGov Asset Builder. Training topics include:
  - o OpenGov Asset Management Administrator
    - Structure Manager
    - Library Manager
    - Layout Manager
    - User/Role Configurations
  - o OpenGov recommended best practices for expanding the system's use and/or building assets
- Provide Preventative Maintenance Plans remote train-the-trainer training, up to two
   (2) sessions. Training topics include:
  - o Preventative Maintenance
  - o OpenGov recommended best practices for proactive asset management
- Provide Advanced Inspections, Asset Condition Manager, and Asset Risk remote train-the-trainer training, up to three (3) sessions. Training topics include:
  - o Performance Management
    - Prediction Groups
    - Minimum Condition Groups
    - Activities and Impacts
    - Criticality Factor
    - Install/Replaced Dates
  - o Business Risk Exposure
    - Risk
    - Consequence of Failure
    - Probability of Failure
  - o OpenGov recommended best practices for Asset Risk Functionality, advanced inspections and condition management

# **Launch**

#### OpenGov will:

• Provide up to remote, up to eight (8) hours, web conferences, of working sessions to answer any questions following solution acceptance.