City of Burlington, VT

VUEWorks® Scope of Work

Prepared for:
City of Burlington, VT

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Proposed Scope of Services for City of Burlington, VT

The following proposed Scope of Services are a combination of remote consultation, configuration and training services designed to provide services to properly configure VUEWorks and train City of Burlington staff to ensure successful use of VUEWorks in meeting City of Burlington's operational needs and goals.

To set the stage for the following tasks and activities, the following definitions apply:

In-Scope Items

1. Project Consultation and Implementation activities as defined in the project schedule.

2. VUEWorks Software configuration activities.

3. Training Activities as defined below.

4. DTS will provide a Dev, Test, and Production license of VUEWorks for the City. DTS will host and maintain these instances on our cloud hosted solution and will provide scripted updates related to software releases and builds as part of normal maintenance and support agreement.

5. Data Migration Activities as defined below.

6. Software Integrations as defined below.

Out-of-Scope Items

1. Data Cleansing, Normalization, Manipulation, Editing, unless agreed upon by VUEWorks Project Manager.

2. GIS data server configuration or network configuration on the City's IT infrastructure.

3. Database administration of any kind related to the City's IT Infrastructure. This includes the creation of database views for data integration activities from any data source.

The Scope of Services will be used to implement VUEWorks in a phased approach. Each phase will follow a similar process and workflow. Each area of focus will include a mix of one or more of the following service categories:

- Project Management
- Consultation
- Documentation

- Configuration
- Training
- Support Services

The recommended phases for this implementation are as follows:

- Phase 1: Project Management and Work Plan

- Phase 2: Software

- Phase 3: Implementation Planning

- Phase 4: Data Migration

- Phase 5: Implementation

- Phase 6: System Integration

- Phase 7: User Acceptance Testing

- Phase 8: Training

- Phase 9: Support and Maintenance

Phase 1 – Project Management and Work Plan

The project kickoff meeting will occur remotely with the City of Burlington. The kickoff meeting is where the project goals and objectives are laid out to the project team, team members and support personnel who will be involved in the process. The VUEWorks implementation tasks, goals, schedule and timeline will be shared with the project team.

All team members will be made aware of when their support will be needed throughout the process, so they can plan for their involvement ahead of major and minor deadlines. This transparency is crucial to the success of the project and to mitigate any risks related to the inevitable change experienced by these team members.

Upon the assemblage of a Project Team, an initial Project Work Plan will be developed and provided to the City by the VUEWorks Project Manager; this will be the cornerstone for the project. The Project Work Plan will lay out the project timeline and will be used as the basis for the agenda for frequent project status meetings coordinated by VUEWorks. The Project Work Plan also includes formal communication paths between and within the City's organization and VUEWorks, with issue resolution procedures defined.

The PM and appropriate team members will also participate in regular progress meetings with City of Burlington to present work completed, receive input from City of Burlington staff, discuss upcoming work, arrange subsequent meetings, and make collaborative decisions. Progress meetings will provide continuous updates to ensure all team members are able to participate in the decision-making process and promote the timely convergence of ideas necessary to maintain the project schedule.

Meeting agendas will be prepared and emailed to prospective attendees in advance of the meeting for review. Within two days of the conclusion of each formal meeting, the PM will prepare meeting minutes or notes and distribute to the project team for review and approval.

The PM will work collaboratively with City of Burlington to identify appropriate meeting intervals outside of scheduled workshops and reviews. Our flexibility provides for a natural partnership allowing informal

meetings and/or site visits to be conducted as dictated by the needs of the project.

As a component of our communication strategy, DTS will submit monthly progress reports indicating the status of project deliverables, work completed during the subsequent reporting period, anticipated work for the next period, and schedule adherence. Should an issue be encountered, the PM will immediately notify City of Burlington and bring project team members together to resolve the issue. Through the implementation of our communications strategy, our organizations will be able to identify, prioritize, and successfully address key project issues in a timely manner necessary to drive schedule compliance.

After this phase, VUEWorks will provide the following deliverables:

1. **Kickoff Meeting Minutes and Action Items**
2. **Project Work Plan Document**
3. **Project Schedule**
4. **Progress Meetings, Agendas, and Meeting minutes**
5. **Monthly Progress Reports**
6. **Monthly Invoices**

Phase 2 – Software

As part of this phase, DTS will install a dev, test, and production instance of VUEWorks on DTS's hosted cloud infrastructure. These environments will be utilized in the proceeding phases. Services include initial data loading into VUEWorks from the City's ArcGIS Server via consuming of Map Services.

DTS will schedule remote System Administrator training with the City after the kickoff. Part of the training provided deals specifically with training those who will be administering the software moving forward. The goal of training the system administrators is to give them the tools to grow VUEWorks over time.

DTS will also schedule remote VUEWorks software overview meetings with City power/end users, which will begin prior to configuration so that power users and end users have a better understanding of how VUEWorks can be configured. This helps Asset Group SME's to provide VUEWorks implementation resources more thought-out workflows/information based on what seeing what VUEWorks is capable of.

After this phase, VUEWorks will provide the following deliverables:

1. **Installation of VUEWorks Dev, Test, and Production instances on DTS cloud**
2. **System Administrator Training**
3. **Power/End User Functionality Overview**

Phase 3 – Implementation Planning

DTS will take a phased approach to plan, configure, integrate and train the City of Burlington. The recommended phasing by Asset Groups with Work Groups identified within is as follows, and is based on phasing in an Asset Group at a time (total of four go-lives):

1. **Water/Sewer/Storm**
   a. Water Distribution
   b. Water Meter Shop
   c. Wastewater Collection (really the Street Maintenance Group)

    d.   Stormwater
    e.   Water Resources Customer Service
    f.   Water Resources Engineering/Technical Services
    g.   Street Maintenance ROW

2. **Parks, Recreation and Waterfront**
    a.   Facilities
    b.   Tree Crew
    c.   Ground Maintenance Crew
    d.   Conservation/Bike Path
    e.   Parks + Planning
    f.   General Fund DPW Customer Service
    g.   Customer Service Team

3. **Water/Sewer (Vertical Assets)**
    a.   Water Treatment
    b.   Wastewater Treatment and Pump Stations
    c.   Water Resources Engineering/Technical Services

4. **ROW/Roads/Parking/Traffic**
    a.   Street Maintenance ROW
    b.   Traffic Operations
    c.   Parking
    d.   Fleet Maintenance
    e.   General Fund DPW Engineering/Technical Services

These Work Groups are not part of a go-live, but will be utilizing some aspect of VUEWorks:

- Innovation Technology
- Clerk/Treasurer's Office

First, DTS will hold discovery meetings with the Work Groups within each Asset Group to review their current business requirements and workflows. These meetings can happen on-site if agreed to by both DTS and the City, or remote if needed. DTS will work with the Asset Group Subject-Matter-Experts (SMEs) to determine which modules are desired for configuration:

- VUEWorks® Core
- VUEWorks® Facilities
- VUEWorks® Service Call
- VUEWorks® Work Order
- VUEWorks® Resource Manager
- VUEWorks® Condition
- VUEWorks® Risk
- VUEWorks® Valuation
- VUEWorks® Projects
- VUEWorks® Budget Forecasting
- VUEWorks® WorkOrderVUE
- VUEWorks® FacilityVUE
- Standard and Custom Reporting

Understanding each Asset Group's goals and priorities, desired business processes, and state of existing data are key to establishing the foundation of the software design. During the discovery meetings, DTS uses the opportunity to educate participants on the standard tools and functionality of the software and

may do additional software demonstrations to help the team visualize options. The City team will be asked to gather data and make decisions during this phase. Things that may be requested include:

- List of Service Request Issues
- List of Work Order activities (Reactive, Preventative, Inspections)
- How is each issue/work order assigned (individual, role, crew etc.)?
- Examples of current work order forms being utilized (if applicable)
- What information is needed to be tracked on a work order form?

Upon completion of each discovery meeting, DTS will then create a detailed Configuration Design Document that serves as a roadmap guide for how the system will be configured during the Implementation phase. The intent for the configuration design plan is to formalize the discussed design and obtain input and feedback from the project team. Major adjustments that are easily incorporated during the implementation planning phase introduce project risk if introduced during the implementation phase. The configuration design plan provides a recipe for the implementation phase and ensures all project participants are able to validate that the configuration meets the intended design.

DTS will send the document to the City for their review, and then a web meeting will be scheduled between the City and DTS to review the document and any questions. The document will need to be approved by the City prior to DTS beginning the Implementation phase.

After this phase, VUEWorks will provide the following deliverables:

1. **Configuration Design Document for each Asset Group (4 total design documents)**
2. **Remote review meeting per Asset Group between the City and DTS (approval required prior to beginning Implementation)**

Phase 4 – Data Migration

DTS will hold discovery sessions to discuss the data migration requirements. The City has identified the following software datasets as needing migration into VUEWorks:

- **RTA** – DTS will perform a one-time data load of City vehicles and equipment into VUEWorks resource manager so that the items can be utilized on Work orders for cost tracking.
- **Facility Dude** - Burlington is currently using Facility Dude for work order management on City-owned buildings and facility assets. The City will provide DTS with an inventory of existing assets to be migrated to VUEWorks. In addition, the City will extract and provide any related work order activities to be migrated to VUEWorks in order to represent historical work performed on these assets.
- **Manager Plus** – Manager Plus is used to track work orders for the water treatment plant and associated assets. The City will provide an extract of the asset inventory for DTS to migrate to VUEWorks. While this inventory is not complete, it does provide a good starting point for the new system.
- **KeepTraK** - KeepTraK is used to track work orders for the wastewater treatment plants and pump stations. The City will provide an extract of the asset inventory for DTS to migrate to the VUEWorks. While this inventory is not complete, it does provide a good starting point for the VUEWorks

- **ArcGIS Water Resources Service/Work Orders -** Work items for Water Resource assets are currently tracked in GIS related tables which link to the GIS assets. This includes activities such as pipe cleanings, pipe videos (Granite XP), hydrant inspections/maintenance, hydrant flow tests, valve exercising, water breaks, catch basin cleaning and inspection records etc. The City will provide the related tables for DTS to migrate into VUEWorks in order to preserve the work order history related to the assets
- **Go Canvas data –** the City has some amount of data in this system which can certainly be replaced with VUEWorks. The City is currently checking in-house to get a data list and to see what would need to be migrated.

Since VUEWorks is a GIS-centric system, it can support consuming GIS data the City may be utilizing in ESRI's Collector application, as well as consuming GIS data that may be created later, such as sidewalk inventory. This is handled as part of VUEWorks native GIS integration.

The Migration tasks that could be used for this project include:

- Investigate existing asset systems operational features and database structure for asset data.
- Functional requirements for the asset data by asset type.
- Identification of asset types and fields that will be migrated to GIS feature classes for use by VUEWorks.
- Identification of asset types and fields that will be migrated to the VUEWorks modules.
- Identification of the asset hierarchy that will be replicated in the VUEWorks modules.
- Identification and migration of dropdown field data that will be transferred. The functional aspects of the dropdown fields will be migrated to GIS domains or VUEWorks dropdowns as appropriate.
- Define data structure and templates required in the GIS or VUEWorks modules.
- Identification of any special considerations for the migration. (ex. numerical data should be migrated to a numerical field even if numerical data is currently stored in a text field).
- Identification of any data that will not be transferred (obsolete data or data that has no value to the City).
- DTS will provide templates where applicable to migrate data over into VUEWorks, and work with the City in outlining how templates will need to be populated
- Plan to accommodate final migration of data immediately prior to the Go Live date.

Prior to beginning the Implementation phase, DTS will work with the City to migrate the identified data agreed upon in this Phase into the City's VUEWorks Dev instance. This will allow the City to review the data migration results prior to the data being migrated into their production environment. During this Phase, DTS will document data integrity issues discovered during the process and address them with the City. Data integrity issues consist mostly of misspellings and/or inconsistent terminology. While it may be possible to address some data integrity issues, DTS will be limited to documenting any issues discovered that may be addressed in the future by the City.

After this phase, VUEWorks will provide the following deliverables:

1. **Data Migration into VUEWorks DEV instance**
2. **Remote review meeting between the City and DTS**
3. **Data Migration Plan**

Phase 5 – Implementation

This Phase will focus on implementing VUEWorks configurations using the approved Configuration Design Document for the following Asset Groups:

1. Water/Sewer/Storm
2. Parks, Recreation and Waterfront
3. Water/Sewer (Vertical Assets)
4. ROW/Roads/Parking/Traffic

VUEWorks module configurations will first take place in the City's Dev instance of VUEWorks. Each module will be configured based on the workflows identified with the SMEs and will follow an iterative process for each Work Group. As part of the configuration, DTS will configure up to 10 Work Order forms for each Work Group, and up to 5 custom reports for each Asset Group. Part of the training will revolve around training system administrators to configure additional work order forms, as well training users on creating reports.

Sprint 1 for each Asset Group will focus on configuring each module as defined in the Configuration Design Document. Sprint 2 will focus on configuring around the system integrations for each Asset Group.

After this phase, VUEWorks will provide the following deliverables:

1. **Configuration review meeting with each Asset Group**
2. **DTS updates to configuration based on review meeting**
3. **Configuration acceptance review meeting with each Asset Group**

Phase 6 – System Integration

Working sessions will be held with the application administrator, business users, and supporting IT professionals to identify the business need for the desired system integrations, assess the viability, and identify the tasks needed to accomplish the integration. A system integration plan will document the outcome of the assessment.

DTS understands that the City is requesting SeeClickFix to be a bi-directional integration, and the other software will use a one-way integration (bringing data into VUEWorks). VUEWorks will support these integrations as part of this consulting agreement. The actual scope of work for these integrations will be determined as part of the business process analysis functions of this project. This process will identify the type of integration needed:

- **Extract, Transform, Load (ETL) One-Way** – Interface is developed to read in data from source database at a desired frequency (Hourly, Daily, Weekly, Monthly, etc.)
- **Data Link** – Direct database connection between source data and VUEWorks. Data is accessed in real-time by VUEWorks.
- **Bi-Directional** – Data is accessed and loaded into VUEWorks using available APIs

The City has identified the following software as integration points:

System	Brief Description	Action
See Click Fix	Citizen service request portal	Integrate – Bi-directional
FlexiBill	Water Resources Customer contact information, water meter usage data (last 12 months), meter work orders	Integrate – one way
ArcGIS	GIS asset inventories	Integrate – bi-directional
Civic Rec	Park facility reservations	Integrate – one way
RTA	Fleet management	Integrate – one way
Tree Works	Tree management	Integrate – one way
PAVER	Pavement condition scores	Integrate – one way
Granite XP	CCTV pipeline inspection software	Integrate – one way
Facility Dude	Facilities / Buildings work order management	Replace
GoCanvas	Inspection forms	Replace
KeepTraK	Wastewater treatment plant work order management	Replace
ManagerPlus	Water treatment plant work order management	Replace
New World	Financial System	Integrate – one way
*Dig Safe	Email request for buried line detection prior to digging	Integrate – one way
*SCADA (optional)	Instrumentation at plants	Integrate

Upon review and approval of the system integration plan, integration tasks and timelines will be incorporated into the overall project schedule.

After this phase, VUEWorks will provide the following deliverables:

1. **Systems Integration Plan**
2. **Systems Integration Deployment**

Phase 7 – User Acceptance Testing

Once configuration is complete, DTS will provide the City with test cases, allowing the City to perform acceptance testing and determine if any configuration changes are required. Upon formal acceptance of the configuration, DTS will promote the Dev instance up to the Test instance.

Upon completion of training, DTS will work with the City to schedule and promote the configuration to the City's Production instance. Go-live dates for each Asset Group will be agreed upon between the City and DTS, and a DTS implementation resource will be available on that day remotely to assist with issues.

After this phase, VUEWorks will provide the following deliverables:

1. **Test Cases and configuration adjustments based on review meetings**
2. **Promotion of configuration/data migration into Production**

Phase 8 – Training

DTS' philosophy is to train early and often throughout the implementation process. DTS recognizes that training and support is one of the most critical of the project phases. DTS will work with the project team to develop a training plan that defines training format, curriculum, number of sessions, and anticipated schedule that is best suited for the City. DTS will hold up to 5 days of productive use training for each Asset Group phasing, utilizing the VUEWorks Test instance. DTS will provide either remote or on-site (if agreed to by DTS and the City) training sessions to select users of the VUEWorks system. Details regarding training location, equipment needs, and attendee lists will also be coordinated.

Instructor led training sessions will be supplemented with standard VUEWorks training material as leave-behinds for future reference. The DTS team is dedicated to our client's long-term success in using our VUEWorks solution. In addition to our end-user training offerings, we perform knowledge transfer with the team of VUEWorks application and business administrators that will be responsible for managing the system. Additional training services through VUEniversity (DTS Learning Management System) can be purchased by the City after go-Live.

After this phase, VUEWorks will provide the following deliverables:

1. **Training for Administrators and Power/End Users**
2. **Standard VUEWorks Training materials (pdfs)**

Phase 9 – Support and Maintenance

DTS understands the challenges that System Administrators face when transitioning staff to a new software. To ease with the transition, the DTS project team will provide roll-out support for the City during the first 60 days. Roll-out support includes weekly pre-set call in time for System Administrators to ask questions or discuss issues that users have reported during the week. The VUEWorks Support team will continue to provide support to administrators beyond the initial roll-out period. DTS will introduce Burlington VUEWorks system administrators to the VUEWorks Support Manager and explain the customer support process as well as the product resources available through the VUEWorks Customer Support Portal. All users will have access to the Customer Support Portal to access the knowledge base, past webinars, and community forum.

Moreover, we provide the following opportunities to remain engaged with our customers, share knowledge, and encourage networking among VUEWorks users.

- Annual Meeting - Facilitated regional user group meetings are held in specific regions annually. In addition, DTS hosts an annual national conference typically held in Orlando. (In 2020, these were virtual.)
- Online Forum - VUEWorks has an internal client only online forum for users to collaborate.
- Resource Documents - Resource and training documents are available online and can be accessed and downloaded by any VUEWorks named user.
- Online Webinars - Online webinars are offered monthly and focus on specific software modules or best practices. These are recorded and made available to users online as well.

Twelve months of support is provided and renewed annually thereafter with the payment of the support and maintenance fee. We offer 8:00 a.m. to 5:00 p.m. Eastern Time telephone support, along with email and web-based support channels. Our technical support staff will provide prompt and helpful support to the City's designated application administrator for troubleshooting assistance, general questions and replicating and documenting defects.

DTS offers a robust release program that is easy to administer. VUEWorks releases version upgrades periodically throughout the year and makes them available on the VUEWorks Customer Support Portal. Each release comes with release notes of the fixes addressed in the build and a description of new features and functionality. VUEWorks is architected such that system configurations persist across versions with the intent of no data loss or substantial configuration impact when performing an upgrade. Clients may apply new builds quarterly or on any schedule of their liking (i.e. biannual, annual, etc.) and our release will apply all appropriate build components of past releases.

After this phase, VUEWorks will provide the following deliverables:

1. **Project Closeout Documentation and Transition to Support**