



Engagement Letter

EAM System Implementation Project Design and Support Services



Santa Rosa, California

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Submitted by SoftResources

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EAM System Implementation Project Design and Support Services

SoftResources will assist the City of Santa Rosa during the EAM implementation process by providing Design and Support Services. We will work with the City's Project Manager/Project Team (City) and the EAM Vendor Implementation Project Team (Vendor) to facilitate and coordinate activities in the role of a Subject Matter Expert throughout the implementation of the solution.

System Implementation Project Design and Support Services are provided based on the needs of the client and/or the software being implemented. These services typically require approximately 10%-30% of a full time equivalent (FTE) SoftResources staff person over the life of the project as they work with the in-house project manager. This estimate assumes that some weeks SoftResources will consume 100% of an FTE while other weeks little or no assistance will be required. In addition, we anticipate some of the services will require SoftResources to be on-site at the City while other services may be provided remotely via teleconference and email communications.

Implementation success is dependent on many factors including the City's Project Manager, City staff, the software solution selected, and the Vendor. SoftResources will support the City as a Subject Matter Expert (SME) through the implementation of the newly acquired EAM system which may include advice on system design and configuration, act as a project advocate to educate and promote the project to functional groups within the City, provide advice in support of best practices for EAM design and implementation, and participate in meetings as necessary to remain abreast of project progression.

Project Approach and Work Plan

SoftResources may provide any or all of the following System Implementation Project Design and Support Services depending on the needs and requests of the City:

- a. **Project Plan Review.** Participate in the Kickoff Meeting and provide input into the Project Plan that defines tasks, assigns responsibilities, milestones, and deliverables. Work with the City and Vendor to suggest modifications to the Project Plan (typically developed by the Vendor) as necessary.
- b. **Quality Control Plan.** Work with the City and Vendor and provide input as they develop a Quality Control Plan that will be used to manage overall success of the project.
- c. **Design and Support Services.** Advise the City as they maintain the overall Project Plan for the life of the project in the role of a Subject Matter Expert. Participate in periodic status meetings with the City and Vendor.
- d. **Project Advocate.** Work with the Project Team in providing strategic design and direction as needed. Assist functional groups within the City in understanding the value of the new EAM system, and how best to utilize its functionality.
- e. **Data Conversion.** Assist with the review and/or development of a high level Data Conversion Plan. The Plan includes tasks such as identification of data to be converted, an approach to extraction of data from legacy systems, importing data to replacement applications and testing of converted data.
- f. **Testing.** Advise the City and provide review during the development the City's Testing Plan for all stages of the implementation. Provide assistance with the review of Test Scripts and testing results.

- g. **User Training.** Advise the City with the development and review of the City's Training Plan. The Plan may include tasks such as identification of who needs to be trained, what they need to be trained on, who will provide the training, what training materials are required, who will develop the training materials and when the training will be delivered.
- h. **Project Close Out.** Assist the City Project Manager with Project Close Out, including review of the Project Plan to ensure all tasks are complete, review of Cutover Strategy to be used by the City to help ensure all steps have been properly executed, and participate in the Vendor handoff to the City staff. Additionally, we may assist the City to conduct an assessment of the success of the implementation based on defined goals and objectives.

Estimated Fees

SoftResources will work with the City as a SME to provide EAM System Implementation Project Design and Support Services as outlined above on a time and materials basis. SoftResources billing rate is \$175/hour.

The following table outlines annual (over 12 months) estimated services and travel for the project. The hours used per month will depend on the services requested by the City; however based on discussions with the City, SoftResources estimates a total budget of \$50,000 for each 12 month period.

| Description | Quantity | Fees |
|--|-----------|-----------------|
| Fees: Implementation Project Management Oversight at \$175/hour | 224 Hours | \$39,200 |
| Expenses: \$1,200 per on-site trip (1.5 days each) to Santa Rosa | 9 Trips | 10,800 |
| Total Estimated Amount Per Year | | \$50,000 |

Expenses are billed for reimbursement as incurred. Travel expenses such as airfare, per Diem (GSA rate), car, parking, mileage, etc., are estimated above. Our fees and expenses will be billed to coincide with services provided. Billing will occur on a monthly basis.

The current anticipated start date for the Project is April 2018.

City's Participation and Responsibilities

In order to successfully complete the engagement it is expected that the City will:

- Designate a Project Manager and Project Team, as well as coordinate roles and responsibilities.
- Be responsible for giving vendors the appropriate information throughout the implementation.
- Ensure SoftResources is engaged in project communications and project updates sufficient to keep SoftResources staff up to date on project progress.
- Be responsible for the successful implementation of the new EAM software.
- Be responsible for all tasks not assigned to SoftResources.

Scope Control

If there are services performed at the City's request, which are outside of those listed in the Project Approach and Work Plan section of this letter, an amendment to this engagement letter or a new letter of understanding will be drafted for City's approval before the services are performed.

Staffing

Ron Loos, Director at SoftResources will provide all services outlined in this engagement letter.

Termination and Deferral

If the City decides to defer or terminate the contract, SoftResources will cease work on the project and bill for services performed up to the point of termination.

Confirmation

For your convenience in confirming this arrangement we have enclosed an acceptance page for your signature. Please sign and email a PDF to sarnesen@softresources.com.

Spencer Arnesen, CPA, Principal
SoftResources LLC

Proposal Acceptance Notification

To: Spencer Arnesen
SoftResources LLC
Via Email: sarnesen@softresources.com

From: Lori Urbanek, Deputy Director - Capital Projects Engineering
City of Santa Rosa

The SoftResources Engagement Letter dated January 23, 2018 is accepted.

SoftResources Tax ID# is: 91-1700358

Company

City of Santa Rosa

SoftResources LLC

Signature

Printed Name

Title

Date
