TASK ORDER 1 SBS – City of Ocala

Technical Services – AUD Implementation

1. EXECUTIVE SUMMARY

The purpose of this Scope of Work is to implement the SBS Automated Utility Design™ (AUD) Plugin for AutoCAD® Map 3D as the Distribution design Tool at the City of Ocala (Ocala). This includes configuration of Ocala's Compatible Units (CU) and associated material items in Automated Utility Design.

In this Task Order, "System" is defined as Ocala's configured infrastructure, services and SBS configured products. SBS products include:

- Automated Utility Design™("AUD")

SBS will use a semi-agile iterative development approach for this project. This approach allows for users and developers to interact on a regular scheduled basis to validate design and configuration requirements, and adjust the development as needed early in the development cycle. The close interaction between SBS and Ocala throughout the project will allow Ocala to minimize the complexity of the testing and deployment.

The semi-agile approach will allow SBS and Ocala to work together throughout the project and adjust the requirements and design to ensure the final delivery meets Ocala business requirements. As Ocala has the domain knowledge of their standards and systems, the SBS delivery methodology is to utilize SBS technical skills and Ocala's domain knowledge. Through this process, SBS provides initial AUD knowledge transfer training at the beginning of the project. The intent of the knowledge transfer is to allow Ocala to make more intelligent decisions during requirement gathering. Training is not intended to be the final training of the project, rather it's a knowledge transfer. The goal of the knowledge transfer is for the Ocala to understand the capabilities of the system, and SBS to understand Ocala's infrastructure and processes.

2. SCOPE OF WORK

Spatial Business Systems (SBS) will provide the following Services related to the following tasks:

Task 1 – Project Preparation, Kick-Off and Management

To prepare for the project, the SBS Project Manager and Technical Consultant will participate in a remote Project Kick-off meeting with the Ocala project team. The purpose of the kick-off meeting is to set expectations for the project, to include deliverables, schedules and roles and responsibilities. The following topics will be discussed:

- Scope of Work and work responsibilities
- Roles and Responsibilities
- Deliverables
- Hardware and software requirements
- Key dates for deliverables

SBS will perform the project management activities required to manage the SBS resources to complete this SOW to include:

- Managing SBS and assigned Partner resources to the agreed upon schedule
- Attending project status calls and status reporting, as needed

Task 1 Artifacts:

- Support Project Status calls
- Project plan including milestones, dependencies, & responsibilities

Task 1 Assumptions:

- SBS may utilize a trusted Implementation Partner, with the support of SBS, to assist with the delivery of this Scope of Work
- Ocala procurement of SBS software has been completed prior to initiation of this Scope of Work
- Project will utilize a semi-agile process for delivery.
- SBS AUD Admin Toolkit will produce As-is documentation of AUD rules and configuration.

Task 2 – Knowledge Transfer (Technology Introduction)

This task is the technology introduction activity between SBS and Ocala core project team, and a small representative of end users. This task will be used to introduce Ocala to the model-based design concept and capabilities provided by Automated Utility Design (AUD). This Task is to give Ocala the information that they will need to provide for the requirement sessions (e.g., stylizations, material ordering, design standards, etc.).

The introduction will cover the following topics:

AUD User Knowledge Transfer (Technology Introduction)

A two (2) day-long instructor led course based on out-of-the-box (OOTB) product. This training will be focused on day-to-day users of AUD. Instruction will be performed utilizing the AUD out-of-the-box Electric configuration. Knowledge Transfer will include lectures and hands-on AUD exercises.

The agenda includes the following lessons:

- Lesson 1: AUD Concepts
- Lesson 2: User Interface
- Lesson 3: Starting Projects
- Lesson 4: Data Import
- Lesson 5: Utility Design layout basics
- Lesson 6: Overhead Basics
- Lesson 7: Advanced Layout techniques
- Lesson 8: Analysis Basics
- Lesson 9: Material Ordering
- Lesson 10: Staking sheets and details
- Lesson 11: 3D visualization

Task 2 Artifacts and Workshops:

- Technology Introduction Workshops

- Access to core SBS training material

Task 2 Deliverables:

- No Deliverables

Task 2 Assumptions:

- Ocala is responsible for the installation of AutoCAD Map 3D 2021 or newer to host AUD and the SBS provided Training Installer with exercises
- Courseware for training will be in US English
- Trainees have working knowledge of Overhead (OH) and Underground (UG) electric design and are familiar with the Ocala 's design workflow processes, AutoCAD drafting, engineering analysis, and Ocala's design and construction standards.
- Ocala is responsible for ensuring attendees have access to an individual instance of the AUD software installed and configured.
- Attendees should include representatives of both Design and GIS groups that will be involved during the Design Tool project.

Task 3 – AUD High-Level Design & Template Configuration

Using information gained from Task 2, SBS will work with Ocala to develop Ocala's High-Level Design for the AUD configuration. As SBS and Ocala work through the requirement gathering process, Ocala will assist in prioritizing the functionality that is most important for the end state. Under this scope of work, SBS will provide up to two hundred seventy-five (275) hours of Design and Configuration support. The AUD configuration is intended to utilize out-of-the box product capabilities wherever possible. It is expected that the Ocala Solution will follow as closely to the out-of-the box to reduce complexity of the implementation and fit within the allotted budget of this Task. It is expected that all advanced configurations will be deferred until a later phase to allow for the fundamentals to be focused on first – material ordering and construction packages for the field.

The schedule and facilitation of the workshops will be mutually agreed between SBS and Ocala.

Following the initial gathering of the requirements, SBS will configure a template populated with Ocala's Compatible Units (CU). SBS will configure the Ocala CU's to the AUD material catalog and update the Industry Data Model to support design standards. SBS will provide a spreadsheet (in MS Excel format) that will be populated with default engineering values. Once the spreadsheet is updated by Ocala, SBS will create the AUD models and templates.

Throughout the duration of this Task SBS will provide Ocala with interim AUD template deliveries, with each delivery building upon previous delivered capabilities. The interim deliveries will be followed up with remote working sessions to discuss and review the deliveries. These will allow Ocala to validate that requirements have been properly interpreted and implemented along with provide an opportunity for knowledge transfer and heightened familiarity with the solution.

Halfway through this task, these working sessions will evolve into Over the Shoulder (OTS) validation sessions. These sessions are intended to serve as hands-on opportunities for SBS and Ocala to work together with the new configuration. This activity is intended to provide additional change management opportunities and insight for the change team to gain insight into the available configuration for use with planning.

Once the configuration for the AUD Template has been configured to meet the requirements, Ocala will be responsible for conducting any additional testing and deployment of the Solution into Production.

Ocala may choose to utilize a portion of the two hundred seventy-five hundred for testing support, training or any other task that may be deemed beneficial.

Task 3 Artifacts and Workshops:

- AUD Configuration workshop series
- Multiple interim AUD Template delivered to Development environment and Testing environments
- Up to two hundred seventy-five AUD Design & Configuration Technical Support hours

Task 3 Deliverables:

- Configured AUD template delivered to Development and Testing environments

Task 3 Assumptions:

- Ocala will provide an export of the available CU's or Materials to support the AUD Configuration
- Prior to the workshops Ocala will supply SBS with any coding or deployment policies SBS must adhere to during the development and deployment.
- The SBS Design documents are living documents that captures and tracks the status of the requirements. While the requirements cannot be changed, the document will be continually be updated throughout the project to capture the acceptance criteria, unit test results, delivery dates, Ocala's review, and acceptance date.
- The intent is to utilize product out-of-the box capabilities wherever possible. Any requirement requiring custom code will be captured and agreed to by Ocala prior to implementation.
- Ocala is responsible for the development of any 3D Blocks. SBS can provide training on how to edit or create new models.
- Ocala is responsible for testing of the available configuration
- Ocala is responsible for Deployment of the solution to Production
- Ocala is responsible for Training additional Users on the Solution

3. GENERAL ASSUMPTIONS

- All training material, delivery methodology, and configuration tools utilized by SBS to perform the tasks defined in this Statement of Work are based on existing SBS Intellectual Property. SBS will retain all Intellectual Property (IP). Ocala will have perpetual rights to utilize all goods delivered under this contract.
- Under this Scope of Work, SBS will provide up to two hundred seventy-five (275) hours of Design and Configuration activities as outlined in Task 3.
- Ocala is responsible for procuring and setting up all hardware and software licenses for the Solution components.
- The creation of all other documentation not defined in this scope of work required by Ocala procedures or standards is Ocala responsibility.
- Ocala systems are expected to remain for the duration of the project. Any planned upgrades to Ocala's systems will be discussed at the Project kick-off meeting
- SBS and Ocala routine calls will allow documentation to be kept at a minimum.

4. PRICING AND PAYMENT TERMS

Service Fees:

SBS will provide services for Tasks 1 through 3 for a fixed price of **$75,000 USD**. This fee does not include travel and living expenses.

Expenses:

Travel and expenses will be billed at actual without markup when mutually approved by both SBS and RPL. Expenses for this proposal are estimated **not to exceed $5,000 USD**.

Payment Schedule:

SBS will invoice based on the following Schedule.

Milestones	Amount
Milestone 1: Project Kick - Off Complete (Task 1)	$11,250.00
Milestone 2: Technology Introduction Complete (Task 2)	$11,250.00
Milestone 3: Initial AUD Template Delivered (Task 3)	$18,750.00
Milestone 4: Fully Configured AUD Template Delivered (Task 3)	$33,750.00
Services Total	**$75,000.00**

5. TASK ORDER ACCEPTANCE

Each of the parties has caused this Task Order to be executed and does hereby warrant and represent that its respective signatory whose signature appears below has been and is on the date set forth above duly authorized by all necessary and appropriate corporate action to execute and make binding this Task Order.

CITY OF OCALA	SPATIAL BUSINESS SYSTEMS LLC
Signature	Signature
Printed Name	Printed Name
Title	Title

Date

Date

CONTRACT RETURN INSTRUCTIONS:

Please print and sign two (2) original documents and send to the following address:

Spatial Business Systems, LLC

ATTN: Al Eliasen
1890 W Littleton Blvd
Littleton, CO 80120

OR email a copy to:

contracts@spatialbiz.com

One fully executed copy will be returned to you for your records.

Appendix A

Project Delivery Definitions:

- **Semi Agile Delivery Approach** – An SBS defined delivery methodology that relies on an iterative process of heavy prototyping and interim deliveries to ensure the closing of the gap between SBS technology and Client Business Processes. To contain scope, the process starts with an upfront definition of the Solution Architecture & High-Level design that is mutually agreed upon and includes flexibility to refine detailed requirements throughout the life of the Project by adjusting the expected acceptance criteria to match. Additionally, this methodology optimizes an interactive solution to be User ready versus requirements sell off. Inherently, this process is intended to increase knowledge transfer of design and configuration throughout the project to permit a decrease in complexity and surprise during formal test phases.
- **Module –** Delineation between the products involved in the Solution: AUD, UDH – EAM, and UDH - GIS
- **SMART Tools –** Structured Management AUD Requirements Tools; real time documentation tool in standardized format & administrative tool to create and maintain the configuration.
- **ModelMapper –** component of the UDH – GIS that provides the configuration for mapping & is the administrative GUI tool to create and maintain the configuration
- **KT (Knowledge Transfer)** – Up front activity to provide the AUD Out of the Box Training
- **Solution Blueprint Architecture –** Workshop and document to capture the architecture components of the SBS deliverables and how they interact wit the system level architecture of the Client.
- **SBS Design Document(s)** – Excel spreadsheets that contain each module's detailed requirements and status.
- **Work In Progress (WIP)** – A snap-shot in time formal demonstration of the Build & Configuration phase to provide all interested project parties with an opportunity to review the development progress. It is expected at the conclusion of the WIP sessions there will be a series of feedback from the Client that the Project Team will need to assess and provided adjustments on to ensure meeting the required acceptance criteria.
- **Unit Test –** SBS activity to conduct functional testing in parallel to the Build & Configuration Phase
- **System Test (ST) or Factory Acceptance Testing (FAT)** – SBS activity to conduct end to end testing while still in the Build & Configuration phase to ensure SIT readiness.
- **OTS (Over the Shoulder) Validation / Paired Testing –** Over the shoulder testing with the Client utilizing the current configuration and existing Designs to familiarize and work together.