Summary Title: PM Services for Phone System Upgrade

Title: Approval of Contract with Communication Strategies for Project Management Services for Telephone System Replacement and Infrastructure Upgrade in the Total Amount of $119,700

From: City Manager

Lead Department: Administrative Services

Recommendation
Staff recommends that Council Authorize the City Manager or his designee to execute the attached contract with Communication Strategies in the base amount of $99,750 and $19,950 in contingencies with a total amount not to exceed $119,700 for telecommunications and infrastructure project management services in support of the implementation of a new telephone system. This is one contract of approximately four that will amount to a total of $2.4 million dollars for the total project.

Executive Summary
Approval of a contract with Communications Strategies, Inc in the base amount of $99,750 and $19,950 in contingencies with a total amount not to exceed $119,700 for telecommunications and infrastructure project management services.

Background
A majority of the City’s telecommunications systems (Phone System, Voicemail, and Data) are over 20 years old and are no longer supported by the manufacturer. The hardware has experienced down time over the last several years that have led to temporary loss of telephone services. The reliability of the City’s telephone and telecommunications services is critical to City operations. The telephone system is old and many of the telephones components are no longer manufactured with replacements becoming difficult to come by.

Discussion
In September of 2009, staff contracted with a telecommunications professional services consultant, Communication Strategies, to prepare a feasibility study and needs analysis of the City’s telephone and voicemail systems to determine the direction the City should pursue to upgrade the system and at what estimated costs. In August of 2010, the consultant provided their findings and recommended moving in the direction of an industry standard Voice over Internet Protocol (VoIP) phone system. It was also recommended that the City first perform
essential and requisite infrastructure upgrades to ensure Quality of Service (QoS), Power over Ethernet (PoE) redundancy, and capacity management including:

- Cabling (approximately 70% of the City’s cabling is antiquated CAT3 cabling)
- Heating, ventilation, and air conditioning (HVAC)
- Power (including Uninterruptible Power Supply (UPS))
- Facility renovations (for cabling closets)

The estimated total cost range for this recommendation is $1,990,000 - $2,180,000.

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Internet Protocol (IP) Telephony Call Processing hardware, software and implementation costs. Redundancy/Resiliency and failover is included</td>
<td>$725,000-$800,000</td>
</tr>
<tr>
<td>Refresh of all IT switching equipment</td>
<td>$630,000-$730,000</td>
</tr>
<tr>
<td>UPS and additional power requirements for access switches</td>
<td>$100,000</td>
</tr>
<tr>
<td>Misc. Feeder cable/Fiber/Intermediate Distribution Frame (IDF) work</td>
<td>$60,000</td>
</tr>
<tr>
<td>Refresh of all City IT cabling infrastructure with 2000 runs of Cat6 plenum rated cable @$200 per drop (includes allowance for asbestos work)</td>
<td>$400,000</td>
</tr>
<tr>
<td>Project Management Costs (RFP/Evaluation/Project Management)</td>
<td>$75,000-$90,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$1,990,000-$2,180,000</strong></td>
</tr>
<tr>
<td>Annual Support (after year 1) Telephone system</td>
<td>$40,000</td>
</tr>
</tbody>
</table>

In order to ensure competitive pricing, City staff elected to do another competitive solicitation for Project Management services. In December of 2010, proposals were received in response to a Request for Proposal (RFP) for telecommunications and infrastructure upgrade Project Management services. Three vendors submitted proposals and vendor interviews were conducted. The following lists the vendors that submitted proposals:

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Location (City, State)</th>
<th>Selected for Oral Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visionary Integration Professionals</td>
<td>Sacramento, CA</td>
<td>Yes</td>
</tr>
<tr>
<td>Communication Strategies</td>
<td>Saint Helena, CA</td>
<td>Yes</td>
</tr>
<tr>
<td>Client First Consulting Group</td>
<td>Corona, CA</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Cost Range of Proposals Submitted: $99,750 - $350,000
Staff carefully rated and ranked each firm's submittal in response to the RFP relative to the following criteria:

- **Vendor Experience**
- **Knowledge of and compliance with applicable laws, regulations, and policies**
- **Completeness and Quality of Proposal**
- **Cost Proposal**

Upon staff’s evaluation of the proposals and vendor interviews, Communication Strategies was selected as the recommended awarded vendor based on all the above criteria. Communication Strategies has extensive knowledge in telecommunications and technical infrastructure, has a proven track record working with other public agencies such as, City of Tracy, City of Manteca, Stanislaus County Office of Education, San Mateo County, and Stanford Hospital and Clinics. In addition, Communication Strategies submitted the most favorable proposal in terms of cost.

Moving forward, Communication Strategies will assist with developing requirements for all components of this upgrade, develop specifications, establish evaluation criteria, coordinate vendor interviews, assist with contract execution, and provide overall project management during implementation.

**Resource Impact**
In anticipation for this work, CIP TE-00010 was established in the amount of $1 million dollars. Due to the required infrastructure upgrades needed to support the implementation of a new phone system, staff will be asking for additional funding. The phone system cost will be allocated to all funds based on usage. The Funding sources will first be identified by the closure of technology CIPs that are completed or no longer needed and then utilizing Technology Fund reserves.

**Environmental Review**
This is not a project for purposes of the California Environmental Quality Act.

**Attachments:**
- Attachment A: Communication Strategies Contract (PDF)

Prepared By: Lisa Bolger, Manager, IT

Department Head: Lalo Perez, Director

City Manager Approval: James Keene, City Manager
CITY OF PALO ALTO CONTRACT NO.: S11139066

AGREEMENT BETWEEN THE CITY OF PALO ALTO AND
COMMUNICATIONS STRATEGIES
FOR PROFESSIONAL SERVICES
TELEPHONE SYSTEM REPLACEMENT PROJECT MANAGEMENT SERVICES

This AGREEMENT is entered into on this 2nd day of May, 2011, by and between the CITY OF PALO ALTO, a California chartered municipal corporation ("CITY"), and Communications Strategies, a Corporation, located at 1176 Starr Avenue, Saint Helena, California, 94574 ("CONSULTANT").

RECITALS

The following recitals are a substantive portion of this Agreement.

A. CITY intends to hire Communications Strategies to perform Telephone System Replacement Project Management Services for the City of Palo Alto (Project") and desires to engage a consultant to complete in connection with the Project ("Services").

B. CONSULTANT has represented that it has the necessary professional expertise, qualifications, and capability, and all required licenses and/or certifications to provide the Services.

C. CITY in reliance on these representations desires to engage CONSULTANT to provide the Services as more fully described in Exhibit “A”, attached to and made a part of this Agreement.

NOW, THEREFORE, in consideration of the recitals, covenants, terms, and conditions, this Agreement, the parties agree:

AGREEMENT

SECTION 1. SCOPE OF SERVICES. CONSULTANT shall perform the Services described in Exhibit “A” in accordance with the terms and conditions contained in this Agreement. The performance of all Services shall be to the reasonable satisfaction of CITY.

SECTION 2. TERM.
The term of this Agreement shall be from the date of its full execution through October 31, 2011 unless terminated earlier pursuant to Section 19 of this Agreement.
SECTION 3. SCHEDULE OF PERFORMANCE. Time is of the essence in the performance of Services under this Agreement. CONSULTANT shall complete the Services within the term of this Agreement and in accordance with the schedule set forth in Exhibit “A”, attached to and made a part of this Agreement. Any Services for which times for performance are not specified in this Agreement shall be commenced and completed by CONSULTANT in a reasonably prompt and timely manner based upon the circumstances and direction communicated to the CONSULTANT. CITY’s agreement to extend the term or the schedule for performance shall not preclude recovery of damages for delay if the extension is required due to the fault of CONSULTANT.

SECTION 4. NOT TO EXCEED COMPENSATION. The compensation to be paid to CONSULTANT for performance of the Services described in Exhibit “A”, including both payment for professional services and reimbursable expenses, shall not exceed Ninety-nine Thousand Seven Hundred and Fifty Dollars ($99,750). In the event additional services are authorized, the total compensation for services and reimbursable expenses shall not exceed $19,950 dollars, thereby the total Not-To-Exceed value of this agreement shall exceed $119,700 dollars. The applicable rates and schedule of payment are set out in Exhibit “C”, which is attached to and made a part of this Agreement.

Additional Services, if any, shall be authorized in accordance with and subject to the provisions of Exhibit “A”. CONSULTANT shall not receive any compensation for Additional Services performed without the prior written authorization of CITY. Additional Services shall mean any work that is determined by CITY to be necessary for the proper completion of the Project, but which is not included within the Scope of Services described in Exhibit “A”.

SECTION 5. INVOICES. In order to request payment, CONSULTANT shall submit monthly invoices to the CITY describing the services performed and the applicable charges (including an identification of personnel who performed the services, hours worked, hourly rates, and reimbursable expenses), based upon the CONSULTANT’s billing rates (set forth in Exhibit “B”). If applicable, the invoice shall also describe the percentage of completion of each task. The information in CONSULTANT’s payment requests shall be subject to verification by CITY. CONSULTANT shall send all invoices to the City’s project manager at the address specified in Section 13 below. The City will generally process and pay invoices within thirty (30) days of receipt.

SECTION 6. QUALIFICATIONS/STANDARD OF CARE. All of the Services shall be performed by CONSULTANT or under CONSULTANT’s supervision. CONSULTANT represents that it possesses the professional and technical personnel necessary to perform the Services required by this Agreement and that the personnel have sufficient skill and experience to perform the Services assigned to them. CONSULTANT represents that it, its employees and subconsultants, if permitted, have and shall maintain during the term of this Agreement all licenses, permits, qualifications, insurance and approvals of whatever nature that are legally required to perform the Services.

All of the services to be furnished by CONSULTANT under this agreement shall meet the professional standard and quality that prevail among professionals in the same discipline and of similar knowledge and skill engaged in related work throughout California under the same or similar circumstances.
SECTION 7. COMPLIANCE WITH LAWS. CONSULTANT shall keep itself informed of and in compliance with all federal, state and local laws, ordinances, regulations, and orders that may affect in any manner the Project or the performance of the Services or those engaged to perform Services under this Agreement. CONSULTANT shall procure all permits and licenses, pay all charges and fees, and give all notices required by law in the performance of the Services.

SECTION 8. ERRORS/OMISSIONS. CONSULTANT shall correct, at no cost to CITY, any and all errors, omissions, or ambiguities in the work product submitted to CITY, provided CITY gives notice to CONSULTANT. If CONSULTANT has prepared plans and specifications or other design documents to construct the Project, CONSULTANT shall be obligated to correct any and all errors, omissions or ambiguities discovered prior to and during the course of construction of the Project. This obligation shall survive termination of the Agreement.

SECTION 9. COST ESTIMATES. NOT APPLICABLE

SECTION 10. INDEPENDENT CONTRACTOR. It is understood and agreed that in performing the Services under this Agreement CONSULTANT, and any person employed by or contracted with CONSULTANT to furnish labor and/or materials under this Agreement, shall act as and be an independent contractor and not an agent or employee of the CITY.

SECTION 11. ASSIGNMENT. The parties agree that the expertise and experience of CONSULTANT are material considerations for this Agreement. CONSULTANT shall not assign or transfer any interest in this Agreement nor the performance of any of CONSULTANT’s obligations hereunder without the prior written consent of the city manager. Consent to one assignment will not be deemed to be consent to any subsequent assignment. Any assignment made without the approval of the city manager will be void.

SECTION 12. SUBCONTRACTING.

No Subcontractor: CONSULTANT shall not subcontract any portion of the work to be performed under this Agreement without the prior written authorization of the city manager or designee.

SECTION 13. PROJECT MANAGEMENT. CONSULTANT will assign Chuck Vondra as the Project Manager to have supervisory responsibility for the performance, progress, and execution of the Services and to represent CONSULTANT during the day-to-day work on the Project. If circumstances cause the substitution of the project manager or any other key personnel for any reason, the appointment of a substitute project director and the assignment of any key new or replacement personnel will be subject to the prior written approval of the CITY’s project manager. CONSULTANT, at CITY’s request, shall promptly remove personnel who CITY finds do not perform the Services in an acceptable manner, are uncooperative, or present a threat to the adequate or timely completion of the Project or a threat to the safety of persons or property.

The City’s project manager is Lisa Bolger of the City of Palo Alto City IT Department. The project manager will be CONSULTANT’s point of contact with respect to performance, progress and
execution of the Services. The CITY may designate an alternate project manager from time to time.

SECTION 14. OWNERSHIP OF MATERIALS. Upon delivery, all work product, including without limitation, all writings, drawings, plans, reports, specifications, calculations, documents, other materials and copyright interests developed under this Agreement shall be and remain the exclusive property of CITY without restriction or limitation upon their use. CONSULTANT agrees that all copyrights which arise from creation of the work pursuant to this Agreement shall be vested in CITY, and CONSULTANT waives and relinquishes all claims to copyright or other intellectual property rights in favor of the CITY. Neither CONSULTANT nor its contractors, if any, shall make any of such materials available to any individual or organization without the prior written approval of the City Manager or designee. CONSULTANT makes no representation of the suitability of the work product for use in or application to circumstances not contemplated by the scope of work.

SECTION 15. AUDITS. CONSULTANT will permit CITY to audit, at any reasonable time during the term of this Agreement and for three (3) years thereafter, CONSULTANT’s records pertaining to matters covered by this Agreement. CONSULTANT further agrees to maintain and retain such records for at least three (3) years after the expiration or earlier termination of this Agreement.

SECTION 16. INDEMNITY.

16.1. To the fullest extent permitted by law, CONSULTANT shall protect, indemnify, defend and hold harmless CITY, its Council members, officers, employees and agents (each an “Indemnified Party”) from and against any and all demands, claims, or liability of any nature, including death or injury to any person, property damage or any other loss, including all costs and expenses of whatever nature including attorneys fees, experts fees, court costs and disbursements (“Claims”) resulting from, arising out of or in any manner related to performance or nonperformance by CONSULTANT, its officers, employees, agents or contractors under this Agreement, regardless of whether or not it is caused in part by an Indemnified Party.

16.2. Notwithstanding the above, nothing in this Section 16 shall be construed to require CONSULTANT to indemnify an Indemnified Party from Claims arising from the active negligence, sole negligence or willful misconduct of an Indemnified Party.

16.3. The acceptance of CONSULTANT’s services and duties by CITY shall not operate as a waiver of the right of indemnification. The provisions of this Section 16 shall survive the expiration or early termination of this Agreement.

SECTION 17. WAIVERS. The waiver by either party of any breach or violation of any covenant, term, condition or provision of this Agreement, or of the provisions of any ordinance or law, will not be deemed to be a waiver of any other term, covenant, condition, provisions, ordinance or law, or of any subsequent breach or violation of the same or of any other term, covenant, condition, provision, ordinance or law.

SECTION 18. INSURANCE.
18.1. CONSULTANT, at its sole cost and expense, shall obtain and maintain, in full force and effect during the term of this Agreement, the insurance coverage described in Exhibit "C". CONSULTANT and its contractors, if any, shall obtain a policy endorsement naming CITY as an additional insured under any general liability or automobile policy or policies.

18.2. All insurance coverage required hereunder shall be provided through carriers with AM Best’s Key Rating Guide ratings of A-:VII or higher which are licensed or authorized to transact insurance business in the State of California. Any and all contractors of CONSULTANT retained to perform Services under this Agreement will obtain and maintain, in full force and effect during the term of this Agreement, identical insurance coverage, naming CITY as an additional insured under such policies as required above.

18.3. Certificates evidencing such insurance shall be filed with CITY concurrently with the execution of this Agreement. The certificates will be subject to the approval of CITY’s Risk Manager and will contain an endorsement stating that the insurance is primary coverage and will not be canceled, or materially reduced in coverage or limits, by the insurer except after filing with the Purchasing Manager thirty (30) days' prior written notice of the cancellation or modification, CONSULTANT shall be responsible for ensuring that current certificates evidencing the insurance are provided to CITY’s Purchasing Manager during the entire term of this Agreement.

18.4. The procuring of such required policy or policies of insurance will not be construed to limit CONSULTANT's liability hereunder nor to fulfill the indemnification provisions of this Agreement. Notwithstanding the policy or policies of insurance, CONSULTANT will be obligated for the full and total amount of any damage, injury, or loss caused by or directly arising as a result of the Services performed under this Agreement, including such damage, injury, or loss arising after the Agreement is terminated or the term has expired.

SECTION 19. TERMINATION OR SUSPENSION OF AGREEMENT OR SERVICES.

19.1. The city manager may suspend the performance of the Services, in whole or in part, or terminate this Agreement, with or without cause, by giving ten (10) days prior written notice thereof to CONSULTANT. Upon receipt of such notice, CONSULTANT will immediately discontinue its performance of the Services.

19.2. CONSULTANT may terminate this Agreement or suspend its performance of the Services by giving thirty (30) days prior written notice thereof to CITY, but only in the event of a substantial failure of performance by CITY.

19.3. Upon such suspension or termination, CONSULTANT shall deliver to the City Manager immediately any and all copies of studies, sketches, drawings, computations, and other data, whether or not completed, prepared by CONSULTANT or its contractors, if any, or given to CONSULTANT or its contractors, if any, in connection with this Agreement. Such materials will become the property of CITY.

19.4. Upon such suspension or termination by CITY, CONSULTANT will be paid for the Services rendered or materials delivered to CITY in accordance with the scope of services on
or before the effective date (i.e., 10 days after giving notice) of suspension or termination; provided, however, if this Agreement is suspended or terminated on account of a default by CONSULTANT, CITY will be obligated to compensate CONSULTANT only for that portion of CONSULTANT’s services which are of direct and immediate benefit to CITY as such determination may be made by the City Manager acting in the reasonable exercise of his/her discretion

19.5. No payment, partial payment, acceptance, or partial acceptance by CITY will operate as a waiver on the part of CITY of any of its rights under this Agreement

SECTION 20. NOTICES.

All notices hereunder will be given in writing and mailed, postage prepaid, by certified mail, addressed as follows:

To CITY: Office of the City Clerk
City of Palo Alto
Post Office Box 10250
Palo Alto, CA 94303

With a copy to the Purchasing Manager

To CONSULTANT: Chuck Vondra
Communications Strategies
1176 Starr Avenue
Saint Helena, CA 94574

SECTION 21. CONFLICT OF INTEREST.

21.1. In accepting this Agreement, CONSULTANT covenants that it presently has no interest, and will not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the Services.

21.2. CONSULTANT further covenants that, in the performance of this Agreement, it will not employ subconsultants, contractors or persons having such an interest. CONSULTANT certifies that no person who has or will have any financial interest under this Agreement is an officer or employee of CITY; this provision will be interpreted in accordance with the applicable provisions of the Palo Alto Municipal Code and the Government Code of the State of California.

21.3. If the Project Manager determines that CONSULTANT is a “Consultant” as that term is defined by the Regulations of the Fair Political Practices Commission, CONSULTANT shall be required and agrees to file the appropriate financial disclosure documents required by the Palo Alto Municipal Code and the Political Reform Act.

SECTION 22. NONDISCRIMINATION. As set forth in Palo Alto Municipal Code section 2.30.510, CONSULTANT certifies that in the performance of this Agreement, it shall not
discriminate in the employment of any person because of the race, skin color, gender, age, religion, disability, national origin, ancestry, sexual orientation, housing status, marital status, familial status, weight or height of such person. CONSULTANT acknowledges that it has read and understands the provisions of Section 2.30.510 of the Palo Alto Municipal Code relating to Nondiscrimination Requirements and the penalties for violation thereof, and agrees to meet all requirements of Section 2.30.510 pertaining to nondiscrimination in employment.

SECTION 23. ENVIRONMENTALLY PREFERRED PURCHASING. CONSULTANT shall comply with the City’s Environmentally Preferred Purchasing policies which are available at the city’s Purchasing Department which are incorporated by reference and may be amended from time to time.

SECTION 24. NON-APPROPRIATION

24.1. This Agreement is subject to the fiscal provisions of the Charter of the City of Palo Alto and the Palo Alto Municipal Code. This Agreement will terminate without any penalty (a) at the end of any fiscal year in the event that funds are not appropriated for the following fiscal year, or (b) at any time within a fiscal year in the event that funds are only appropriated for a portion of the fiscal year and funds for this Agreement are no longer available. This Section 24.8 shall take precedence in the event of a conflict with any other covenant, term, condition, or provision of this Agreement.

24.2. The individuals executing this Agreement represent and warrant that they have the legal capacity and authority to do so on behalf of their respective legal entities.

SECTION 25. MISCELLANEOUS PROVISIONS.

25.1. This Agreement will be governed by the laws of the State of California.

25.2. In the event that an action is brought, the parties agree that trial of such action will be vested exclusively in the state courts of California in the County of Santa Clara, State of California.

25.3. The prevailing party in any action brought to enforce the provisions of this Agreement may recover its reasonable costs and attorneys' fees expended in connection with that action. The prevailing party shall be entitled to recover an amount equal to the fair market value of legal services provided by attorneys employed by it as well as any attorneys’ fees paid to third parties.

25.4. This document represents the entire and integrated agreement between the parties and supersedes all prior negotiations, representations, and contracts, either written or oral. This document may be amended only by a written instrument, which is signed by the parties.

25.5. The covenants, terms, conditions and provisions of this Agreement will apply to, and will bind, the heirs, successors, executors, administrators, assignees, and consultants of the parties.
25.6. If a court of competent jurisdiction finds or rules that any provision of this Agreement or any amendment thereto is void or unenforceable, the unaffected provisions of this Agreement and any amendments thereto will remain in full force and effect.

25.7. All exhibits referred to in this Agreement and any addenda, appendices, attachments, and schedules to this Agreement which, from time to time, may be referred to in any duly executed amendment hereto are by such reference incorporated in this Agreement and will be deemed to be a part of this Agreement.

24.10 If, pursuant to this contract with CONSULTANT, City shares with CONSULTANT personal information as defined in California Civil Code section 1798.81.5(d) about a California resident (“Personal Information”), CONSULTANT shall maintain reasonable and appropriate security procedures to protect that Personal Information, and shall inform City immediately upon learning that there has been a breach in the security of the system or in the security of the Personal Information. CONSULTANT shall not use Personal Information for direct marketing purposes without City’s express written consent.
IN WITNESS WHEREOF, the parties hereto have by their duly authorized representatives executed this Agreement on the date first above written.

CITY OF PALO ALTO

Purchasing Manager

APPROVED AS TO FORM:

COMMUNICATIONS STRATEGIES

By: Charles Vondr
Name: Charles Vondr
Title: Manager

Attachments:
EXHIBIT “A”: SCOPE OF SERVICES
EXHIBIT “B”: WORK PLAN AND PROJET TIMELINE
EXHIBIT “C”: COMPENSATION
EXHIBIT “D”: INSURANCE

Professional Services
Rev. December 1, 2009
EXHIBIT A

SCOPE OF WORK

The “Contractor” will provide Project Management services for the Phone System Replacement project and all corresponding sub-projects supporting the Phone System Replacement.

The following have been identified as probable projects for the Phone System Replacement Program:

1. Acquisition of the new telephone system
2. Re-cabling of the City’s network to provide the necessary capabilities to support a VOIP system.
3. The upgrade of the network hardware which includes but not limited to switches and UPS.
4. The construction of new telecom closets and racking space where needed; the renovations to existing closets where needed.
5. Electrical work might be required for any sites that require it such as new closets or for equipment such as UPS.

If any of the above is of a size not requiring a formal RFP or IFB, the consultant will define the requirements necessary to support the new telephone system and assist where possible to locate an appropriate contractor to perform the work.

The selected consultant will provide:

1. Technical Management of the Procurement Processes (RFP, IFB, Quotes), which includes:
   a. Developing detailed requirements
   b. Writing and finalizing required technical procurement documents
   c. Assisting in facilitating and serving on the evaluation committee
   d. Assisting in coordinating the evaluation team’s efforts and drafting the evaluation process and results including, but not limited to:
      i. Evaluating proposals
      ii. Coordinating vendor interviews
      iii. Short-listing vendors
      iv. Finalizing vendor selection
      v. Obtaining approvals from appropriate decision makers
      vi. Perform contract negotiations and finalize vendor deliverables as needed
      vii. Finalize contract and process approvals (Attorney, City Manager, Council)

2. Management of the Telephone Replacement Program and all sub-projects including, but not limited to:
   a. Formal project kick-off
   b. Training on selected project management methodology
   c. Managing the project plan
   d. Managing the project risks by documenting and implementing a formal risk management plan
   e. Managing project resources, both CoPA and contracted
   f. Managing the project design, development, and implementation efforts
   g. Managing the CoPA test plan
   h. Managing the project change control process
   i. Coordinating efforts of contracted staff, CoPA staff, and other staff and resources.
j. Manage budget and expenses
k. Manage and perform quality assurance for all deliverables
l. Manage project issues
m. Ensure that project documentation is updated accordingly and that a history is maintained

3. Coordinate meetings and monitor resources and issues, keeping the City Project Manager and stakeholders updated
   a. Scheduling meetings with pertinent teams on a weekly basis to monitor progress; preparing and distributing the meeting agenda; documenting and distributing meeting results to interested parties; monitoring action items to ensure timely and documented resolution
   b. Monitoring team members’ “budgeted” time versus “actual” time on a weekly basis; documenting the status; proactively elevating issues to management for resolution
   c. Updating the steering committee on a regular basis with resource and issue status; preparing and distributing the meeting agenda; documenting and distributing meeting results to interested parties; monitoring action items to ensure timely and documented resolution

Deliverables

Including, but not limited to:
1. Development of Requirements Documents
2. RFPs, IFB, Quotes (where appropriate):
   a. Scope of Services
   b. Evaluation Criteria
   c. Evaluation Results
   d. Evaluation Recommendation
   e. Contracts
3. Project Management Documentation (included, but not limited to the following):
   a. Project Management Methodology document
   b. Project charters
   c. Work plans and schedules
   d. Status reports and presentations
   e. Budget to Actual reports
   f. Issues logs
   g. Change logs
   h. Testing Strategy
   i. Training Strategy
   j. Acceptance Criteria
4. Upgraded Infrastructure to support the new Phone System
   a. Cabling
   b. Power, UPS
   c. Facility Renovations
5. Implementation and configuration of the following:
   a. Phone System
   b. Phones and required peripherals
   c. ACD
   d. IVR

Professional Services
Rev. December 1, 2009
e. Call Accounting
f. Voicemail
6. Training (admin and staff) for all items listed in Section 5 above
## EXHIBIT B
WORK PLAN AND PROJEKT TIMELINE

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Deliverable List</th>
<th>Responsible</th>
<th>Start</th>
<th>End</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone 1</td>
<td>Project kickoff</td>
<td>Comm Strat CoPA</td>
<td>5/10/2011</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project Charter</td>
<td>Comm Strat CoPA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Detailed Workplan (.mpp) (schedule and resources)</td>
<td>Comm Strat</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milestone 2</td>
<td>Complete IDF/MDF review</td>
<td>Comm Strat</td>
<td>5/10/2011</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>IDF/MDF Requirements Document</td>
<td>Comm Strat</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>Project Management Documentation for milestone payment:</td>
<td>Comm Strat</td>
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<tr>
<td></td>
<td>Project Management Methodology document</td>
<td>Comm Strat CoPA</td>
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<tr>
<td></td>
<td>Weekly Status Reporting Templates</td>
<td>Comm Strat</td>
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<td>Necessary RFPs, IFB, Quotes (where appropriate)</td>
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<td>- Scope of Services</td>
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Professional Services
Rev. December 1, 2009
Milestone 4
Create RFP for Phone System
- Requirements Document
  - Scope of Services
  - Evaluation Criteria
  - Acceptance Criteria
Comm Strat
Comm Strat
Comm Strat
Comm Strat

Milestone 5
Contract(s) Execution for Infrastructure
- Evaluation Results
- Vendor Interviews
- Evaluation Recommendations
- Acceptance Criteria
CoPA
Comm Strat
Comm Strat
Comm Strat
Comm Strat

Milestone 6
Contract Execution for Phone System
Signed Contract for Phone System
- Evaluation Results
- Evaluation Recommendation
CoPA/Comm Strat
Comm Strat
Comm Strat

Milestone 7
Installation/Testing of Infrastructure
New or upgraded facilities for network, UPS, and telecom hardware
All necessary HVAC operational
All needed UPS in place and tested
All Cabling in-place and tested
LAN performance test results
WAN modifications completed and test results report
Infrastructure Test Plan (Certification)
Successfully Tested Infrastructure Solution
Sign-Off Acceptance Sheet
Comm Strat
Comm Strat
Comm Strat
Comm Strat
Comm Strat
Comm Strat
Comm Strat
Comm Strat

Milestone 8
Installation/Testing of New
2/1/2012 4/15/2012 10%

Professional Services
Rev. December 1, 2009
Telephone System

Deliverable List

New Phone System
- Operational Phones and required peripherals
- Configured and functioning ACD(s)
- Configured and functioning IVR(s)
- Call Accounting system and required reports
- Configured and functioning Voicemail system
- Phone system test results report
- System Administration Program and documentation
- Telephone System Customer Acceptance Sign-off
- Trained Staff on phone system usage
- Trained Staff on systems administration
- Telephone System and Peripheral Equipment Test Plan
- Successfully Tested Telephone Solution and Peripheral Equipment

Milestone 9

Deliverable List

Go-Live and 45 days of Post Go-Live Support
- Documented resolutions of any and all telephony trouble-tickets
- Total project months

Comm Strat

4/15/2012 6/1/2012 10%

Comm Strat

13 100%
## EXHIBIT C

**COMPENSATION**

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EXHIBIT D

INSURANCE CERTIFICATE