Vertosoft

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Leesburg, VA20175 USA

Cage Code: 7QV38
UEI Number Y7D5MXRU2839
DUNS# 080431574
Federal Tax ID: 81-3911287
Business Size: Small Business

Date: 2/19/2026, 12:48 PM

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Vertosoft Quote for OpenGov - City of Fullerton, CA

Contract: Sourcewell: 060624-VTO

Quote #: Q-19265
Expires On: 03/28/2026

Ship To
City of Fullerton, CA
Marcelo Rivas
marcelo.rivas@cityoffullerton.com

Quote For:
Name:
Company: City of Fullerton, CA
Email:
Phone:

PAYMENT TERMS	DELIVERY METHOD	PAYMENT METHOD	VERTOSOFT CUST ID	SUPPLIER REF
Net 30	Electronic	Check/ACH/Credit Card		

Overall POP Start Date: 3/30/2026
Overall POP End Date: 3/29/2029

Term 1   3/30/2026 - 3/29/2027

PART #	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
OG-TWAQ-B200300M-AR-3Y	Asset Management - Between $200-300 Million - 3Y	1.00	$23,145.00	$23,145.00
OG-TWAW-B200300M-AR-3Y	Facilities Domain - Between $200-300 Million - 3Y	1.00	$17,854.00	$17,854.00
OG-TWHT-B200300M-AR-3Y	OpenGov 311 - Between $200-300 Million - 3Y	1.00	$25,000.00	$25,000.00
OG-TWAY-B200300M-AR-3Y	Parks & Recreation Domain - Between $200-300 Million - 3Y	1.00	$16,532.00	$16,532.00
OG-TWBB-B200300M-AR-3Y	Stormwater Domain - Between $200-300 Million - 3Y	1.00	$15,114.00	$15,114.00

PART #	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
OG-TWBC-B200300M-AR-3Y	Transportation Domain - Between $200-300 Million - 3Y	1.00	$17,854.00	$17,854.00
OG-TWAZ-B200300M-AR-3Y	Wastewater Collection - Between $200-300 Million - 3Y	1.00	$16,532.00	$16,532.00
OG-TWBF-B200300M-AR-3Y	Water Distribution Domain - Between $200-300 Million - 3Y	1.00	$16,532.00	$16,532.00
OG-TWBG-B200300M-AR-3Y	Water Treatment Domain - Between $200-300 Million - 3Y	1.00	$15,114.00	$15,114.00
OG-PSBG-B200300M-OT-0Y	Professional Services Deployment - Prepaid - Between $200-300 Million - 0Y	854.00	$215.05	$183,652.70
			Term 1 TOTAL:	$347,329.70

Billed as incurred and not to exceed

PART #	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
OG-Travel-Expense-Reimb	OpenGov - designed for reimbursable travel expenditures. **Estimate expense	16,800.00	$1.00	$16,800.00
		Billed as incurred and not to exceed TOTAL:		$16,800.00

Term 2   3/30/2027 - 3/29/2028

PART #	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
OG-TWAQ-B200300M-AR-3Y	Asset Management - Between $200-300 Million - 3Y	1.00	$24,302.25	$24,302.25
OG-TWAW-B200300M-AR-3Y	Facilities Domain - Between $200-300 Million - 3Y	1.00	$18,746.70	$18,746.70
OG-TWHT-B200300M-AR-3Y	OpenGov 311 - Between $200-300 Million - 3Y	1.00	$26,250.00	$26,250.00
OG-TWAY-B200300M-AR-3Y	Parks & Recreation Domain - Between $200-300 Million - 3Y	1.00	$17,358.60	$17,358.60
OG-TWBB-B200300M-AR-3Y	Stormwater Domain - Between $200-300 Million - 3Y	1.00	$15,869.70	$15,869.70
OG-TWBC-B200300M-AR-3Y	Transportation Domain - Between $200-300 Million - 3Y	1.00	$18,746.70	$18,746.70
OG-TWAZ-B200300M-AR-3Y	Wastewater Collection - Between $200-300 Million - 3Y	1.00	$17,358.60	$17,358.60
OG-TWBF-B200300M-AR-3Y	Water Distribution Domain - Between $200-300 Million - 3Y	1.00	$17,358.60	$17,358.60
OG-TWBG-B200300M-AR-3Y	Water Treatment Domain - Between $200-300 Million - 3Y	1.00	$15,869.70	$15,869.70
			Term 2 TOTAL:	$171,860.85

PART #	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
OG-TWAQ-B200300M-AR-3Y	Asset Management - Between $200-300 Million - 3Y	1.00	$25,517.37	$25,517.37
OG-TWAW-B200300M-AR-3Y	Facilities Domain - Between $200-300 Million - 3Y	1.00	$19,684.03	$19,684.03
OG-TWHT-B200300M-AR-3Y	OpenGov 311 - Between $200-300 Million - 3Y	1.00	$27,562.49	$27,562.49
OG-TWAY-B200300M-AR-3Y	Parks & Recreation Domain - Between $200-300 Million - 3Y	1.00	$18,226.53	$18,226.53
OG-TWBB-B200300M-AR-3Y	Stormwater Domain - Between $200-300 Million - 3Y	1.00	$16,663.18	$16,663.18
OG-TWBC-B200300M-AR-3Y	Transportation Domain - Between $200-300 Million - 3Y	1.00	$19,684.03	$19,684.03
OG-TWAZ-B200300M-AR-3Y	Wastewater Collection - Between $200-300 Million - 3Y	1.00	$18,226.53	$18,226.53
OG-TWBF-B200300M-AR-3Y	Water Distribution Domain - Between $200-300 Million - 3Y	1.00	$18,226.53	$18,226.53
OG-TWBG-B200300M-AR-3Y	Water Treatment Domain - Between $200-300 Million - 3Y	1.00	$16,663.18	$16,663.18
			Term 3 TOTAL:	$180,453.87

Annual invoices will be delivered by the start of each consecutive annual period. Payment of invoices shall be annually in advance. Any Professional Services shall be performed pursuant to the attached Statement of Work, if any

Quote Terms

By purchasing the products and services described in this order form, the Customer is expressly agreeing to the End User Agreement published at https://www.vertosoft.com/terms-and-conditions-opengov

Taxes: Sales tax shall be added at the time of an invoice, unless a copy of a valid tax exemption or resale certificate is provided.
Credit Card Orders: Additional fees may apply if paying by credit card.

All Purchase Orders must include: End User Name, Phone Number, Email Address, Purchase Order Number, Government Contract Number or Our Quote Number, Bill-To and Ship-To Address (Cannot ship to a PO Box), Period of Performance (if applicable), and a Signature of a duly Authorized Representative.

OpenGov

Statement of Work

City of Fullerton, CA

Creation Date: 02/05/2026
SoW Expiration Date: 05/05/2026
Document Number: PS-11026.1
Created by: Brittany Worthy

Table of Contents

OpenGov Statement of Work

1. **Project Scope and Understanding**
    This Statement of Work ("SOW") outlines the Professional Services OpenGov will provide to City of Fullerton, CA ("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 (EAM)
        2.1.2.   Government App Builder
    2.2.   Exhibit 2: Technical Requirements
        2.2.1.   Government App Builder

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.

Any failure by Customer to meet its responsibilities under this SOW (each, a "Customer Delay") will automatically suspend the affected obligations of OpenGov for the duration of the Customer Delay and for a reasonable restart period thereafter. All affected milestones, delivery dates, and service-level commitments will be extended on a day-for-day basis (or as otherwise reasonably necessary) to account for the Customer Delay, and may result in an adjustment of the fees if OpenGov incurs additional time, materials, or other costs as a result. Under no circumstances will any consequence of a Customer Delay constitute a breach by OpenGov of this SOW or of the Agreement, nor will OpenGov be liable for any failure to meet a performance obligation that is caused, in whole or in part, by a Customer Delay.

5. Project Delivery

OpenGov will perform services under this SOW remotely and provide up to three (3) onsite trips for project-related activities. Customer will provide a suitable workspace, including a conference room with attendee capacity, non-public Wi-Fi, and AV equipment. Travel expenses are estimated not to exceed $16,800. 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 estimated duration of this work is twelve (12) months. The specific timeline, including order of delivery of the product(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
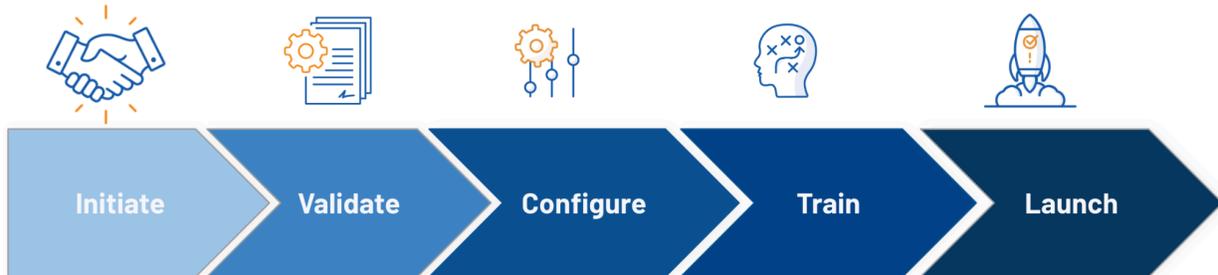
Every OpenGov implementation follows a five-phase hybrid methodology designed to ensure a structured and collaborative deployment. The phases are:

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:

- Transportation
- Parks and Rec
- Facilities
- Stormwater
- Water Distribution
- Water Treatment
- Wastewater Collection / Sanitary Sewer

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 EAM.

Completion Criteria:
- The project kicked off with an initial project timeline delivered.

Validate

OpenGov will:
- Provide a three-day (3-day) onsite 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 validation workshop.

Configure

Configurations
OpenGov will:
- Provide configuration services, including:
  - Up to ten (10) custom fields and up to two (2) custom layouts per asset type listed in the Assets section below
  - 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
  - Up to twenty (20) automations
  - Up to twenty (20) preventative maintenance plans

- Provide up to seven (7) sessions of configuration review to ensure configurations resulting from the validation workshop effectively support all workflows and processes discussed, and to reinforce such configurations with customer stakeholders to adequately prepare to train-the-trainer training.

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 Transportation (8)
    ▪ Bridge; Light Fixture; Pavement; Sign; Guardrail; Marking; Pavement Area; Support
  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
- o Stormwater (9)
  - ▪ Storm Basin; Storm Channel; Storm Culvert; Storm Facility; Storm Inlet; Storm Manhole; Storm Outlet; Storm Pipe; Storm Pump
- o Water Distribution (9)
  - ▪ Water Backflow; Water Facility; Water Hydrant; Water Lateral; Water Main; Water Meter; Water Pump; Water Valve; Water Storage Tank
- o Water Treatment Plant (34)
  - ▪ Water Treatment Plant; Water Treatment Plant Blowers; Water Treatment Plant Compressors; Water Treatment Plant Electrical Generator; Water Treatment Plant Facility; Water Treatment Plant HVAC Equipment; Water Treatment Plant Instrumentation; Water Treatment Plant Motors; Water Treatment Plant Processes; Water Treatment Plant Pump; Water Treatment Plant Screens; Water Treatment Plant Structure; Water Treatment Plant UV; Water Treatment Plant Valves; Water Treatment Plant Floor; Basement Construction; Conveying; Exterior Enclosures; Facility Electrical; Facility Equipment; Fire Protection; Foundations; Furnishings; Interior Construction; Interior Finishes; Plumbing; Roofing; Site Mechanical Issues; Special Construction; Stairs; Superstructure; Selective Building Demolition; Site Preparation; Site Improvement; Other Site Construction
- o Wastewater Collection / Sanitary Sewer (7)
  - ▪ Sewer Cleanout; Sewer Facility; Sewer Force Main; Sewer Lateral; Sewer Main; Sewer Manhole; Sewer Pump
- o Up to three (3) Custom Asset Type(s) to be determined during Validation Workshop.

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 three-day (3-day) onsite "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 Work Order
    - 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

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- o Resource Management:
  - ▪ Resource Details
  - ▪ Labor/Equipment Rates
  - ▪ Material Management (Stock, Usage, Adjustments)
  - ▪ Vendor Price Quotes
  - ▪ 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

End User Training Event
- ● Provide a three-day (3-day) onsite end user 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 Work Order
    - 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 Quotes
    - 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 four (4) 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 six (6) 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
- Provide Internal Request remote train-the-trainer training, up to two (2) sessions. Training topics include:
  - o Internal Requests
    - ▪ Users
    - ▪ Views

- Issue Library settings and management
  - o OpenGov recommended best practices for advanced request management
- Provide Advanced Material Management and Material Planning remote train-the-trainer training, up to eight (8) sessions. Training topics include:
  - Material Locations
  - Material Transfers
  - Material Orders
  - Settings:
    - o Vendor Price Quotes
    - o Re-order points
  - Material Planning
    - o Status Default
    - o Workflow Setup
    - o Notifications
  - OpenGov recommended best practices for advanced material management and Material Planning.

Completion Criteria
- Core Training and train-the-trainer has been conducted.

Launch

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

Completion Criteria:
- Go Live Support has been conducted.

311 Request Management

Initiate

OpenGov will:
- Conduct a project kickoff to align goals, roles, scope, and approach.
- Provision Government App Builder environment; configure initial roles
- Run discovery/working sessions to confirm high-level requirements across channels (web, and mobile-browser).
- Create initial configuration backlog in shared workspace

Customer will:
- Identify stakeholders; ensure attendance at kickoff and working sessions.

- Confirm environment access and user roles.
- Provide process documentation (current service catalog, scripts, categories), reporting examples, and regulatory/retention requirements.
- Review and approve initial configuration backlog and project schedule.

Assumptions:
- OpenGov will use standard templates and intake patterns unless otherwise agreed in writing.
- Branding and content style guides provided by Customer (if applicable)

Completion Criteria:
- Kickoff completed with documented actions.
- Access confirmed for core users.
- Initial backlog and plan approved.
- Shared workspace established.

Validate

OpenGov will:
- Facilitate validation workshop to confirm requirements, dependencies, and acceptance criteria across intake channels, routing rules, SLAs, and reporting.
- Present refined backlog, timeline, and resource plan for sign-off.
- Validate user access, permissions, and environment readiness.
- Update artifacts based on feedback prior to configuration.

Customer will:
- Attend validation with decision-makers and SMEs (call center, departmental responders, IT/GIS).
- Confirm access to needed systems and tools (GIS, work order/asset mgmt, ERP/finance, SSO, legacy data).
- Review and sign off on backlog and plan.
- Resolve internal dependencies that could block configuration.

Assumptions:
- Any additional requirements identified will be assessed for scope and schedule impact.

Completion Criteria:
- Customer sign-off on plan and backlog.
- Access validated.
- No outstanding blockers to start Configure.
- Readiness checkpoint logged in project documentation.

Configure

Service Catalog

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OpenGov will:
- Define catalog taxonomy and metadata; configure categories, subcategories, and article templates
- Provide enablement on ongoing content governance.

Customer will:
- Supply existing catalog lists and knowledge content; designate content owners
- Review layouts and content structure; approve final catalog and initial article set.

Assumptions:
- Content writing and localization are Customer responsibilities unless otherwise contracted.
- External website CMS updates (outside of the 311 portal) are out of scope.

Completion Criteria:
- Service catalog configured and linked to intake workflows.
- Initial knowledge base articles published.
- Governance approach documented.

Service Request Intake & Form (Web & Browser Accessible Mobile)

OpenGov will:
- Configure up to five (5) request types including: data tables, fields, validations, conditional logic, attachments, and layouts.
- Implement address capture and geocoding using standard capabilities and/or GIS integration when in scope.
- Conduct review sessions and iterate to finalize.

Customer will:
- Provide field-level requirements, current scripts, categories, and mandatory data elements.
- Participate in reviews; provide consolidated feedback.
- Validate permissions, logic, and layouts for internal and resident users
- Approve final configurations.

Assumptions:
- Designs leverage standard form capabilities and controls; custom web or native mobile apps are out of scope unless explicitly stated
- Public site branding assets provided by Customer.

Completion Criteria:
- Forms/tables configured and tested
- Address capture/geocoding validated (if in scope).
- Required data capture confirmed
- Customer approval received.

Workflow, Triage & Routing

OpenGov will:
- Configure routing rules, ownership groups, task states, reassignment, and collaboration steps.
- Implement prioritization logic and triage forms.
- Document workflows and test with Customer.

Customer will:
- Provide current process maps, ownership matrices, and escalation criteria.
- Participate in testing and refinement; approve final logic.

Assumptions:
- Automation will use standard workflow options; custom code is out of scope unless listed.
- Location-based routing requires GIS layers and data provided by Customer.

Completion Criteria:
- Workflows live with routing functioning.
- Ownership groups and queues configured.
- Approval received from Customer.

SLAs, Notifications & Escalation

OpenGov will:
- Configure SLA timers (acknowledgment, first response, resolution), indicators, and dashboards.
- Set up resident communications (email/SMS when in scope) and status updates
- Configure escalations to supervisors and leadership.

Customer will:
- Provide SLA definitions per category and business hours/holiday calendars.
- Approve notification templates and escalation paths.
- Validate end-to-end SLA behavior.

Assumptions:
- SMS/email providers and associated fees are Customer responsibilities unless otherwise contracted.
- Two-way messaging outside of standard capabilities may require a Change Order.

Completion Criteria:
- *SLAs operational with monitoring in dashboards
- Notifications and escalations tested
- Customer approval received.

Integration with OpenGov Enterprise Asset Management (EAM)

OpenGov will:
- Enable bi-directional sync so 311 Request Management requests can create EAM work orders when criteria are met, and status updates in EAM reflect back to 311 and the public status page where appropriate.
- Define decision rules for work-order creation (e.g., by category/high-alert flag).
- Map fields between 311 Request Management and EAM (request ID, category, asset/location, status codes, dates).
- Implement API-based integration or agreed method; handle error validation and retries.
- Configure read-backs of EAM status/progress for resident-friendly display on the status page.
- Provide technical runbook and data-mapping documentation.

Customer Responsibilities:
- Provide or confirm EAM environment details, credentials, and test data; confirm asset/address cross-walks.
- Validate mapping, status cross-reference, and acceptance criteria.
- Coordinate with any internal EAM administrators for endpoint access/windows.

Boundaries & Assumptions
- Scope is limited to OpenGov 311 Request Management ↔ OpenGov EAM integration; other third-party systems are out of scope.
- Integration follows standard, supported API capabilities; custom EAM extensions are excluded.

Completion Criteria:
- End-to-end tests demonstrate work-order creation and status synchronization; integration documentation delivered; stakeholder approval received.

Reporting & Dashboards

OpenGov will:
- Configure reports (up to 10), filters, and visualizations; enable exports suitable for council/board/public dashboards (up to 6 unique dashboards)
- Provide enablement on managing report parameters and publishing.

Customer will:
- Define KPIs and reporting needs; provide examples of internal and public reporting.
- Review layouts and logic; test exports; designate owners for ongoing reporting.

Assumptions:
- Reports rely on data available in configured tables or approved imports/integrations.
- Complex, custom templates outside of standard exports may require a Change Order.

Completion Criteria:

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- Reports and dashboards live with accurate data.
- Permissions verified; export formats tested
- Customer approval received.

Train

Administrator & Dispatcher Training

OpenGov will:
- Deliver live virtual training; provide documentation and recordings.
- Cover core admin tasks (form edits, report creation, workflow adjustments, SLA configuration, permission controls).
- Assign practice scenarios.

Customer will:
- Identify admin/dispatcher users; attend training; complete practice exercises; confirm understanding of responsibilities.

Assumptions:
- Training delivered remotely unless otherwise specified.
- Attendees are available at scheduled times.

Completion Criteria:
- Admin training completed; access confirmed for relevant users.
- Practice scenarios validated
- Customer confirms readiness to manage configuration post-launch.

Agent/Field Staff Enablement

OpenGov will:
- Deliver role-based sessions and quick-reference guides.
- Demonstrate status updates, assignment, and completion workflows.

Customer will:
- Ensure attendance; provide device policies and any mobile restrictions.
- Validate that training aligns to field operation needs.

Assumptions:
- Device procurement and management are Customer responsibilities.
- Offline mode support is limited to generally available capabilities.

Completion Criteria:
- Agent/field sessions delivered; materials distributed.
- Readiness sign-off received from departmental leads.

Public/User-Facing Collateral

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OpenGov will:
- Draft how-to guides with screenshots and FAQs; deliver PDF and web-optimized formats.
- Review drafts with Customer for accuracy; finalize collateral.

Customer will:
- Review and provide feedback; approve final content; handle distribution and any localization.

Assumptions:
- Content reflects current forms and processes at go-live.
- Accessibility/translation needs identified by Customer.

Completion Criteria:
- Guides finalized and approved; published via Customer channels.

Launch

OpenGov will:
- Monitor adoption; resolve configuration questions and issues.
- Conduct final stakeholder review; transition to Customer Success.

Customer will:
- Monitor usage; report issues; attend final review; sign solution acceptance.

Assumptions:
- Hypercare support is time-boxed per the Project Plan.
- Post-launch enhancements will be prioritized via Customer Success or Change Orders.

Completion Criteria:
- Hypercare window closed; known issues addressed or queued.
- Stakeholder review completed; solution acceptance signed.

Exhibit 2: Technical Requirements

Government App Builder Technical Requirements

- Migration
  - No historical data migration

- Flat File Integrations
  - Customer must
    - Provide OpenGov with the export file (a delimited file) from the external system
    - Automate the export and/or import of data into and out of the external system.
- API Integrations
  - Customer is responsible for:
    - Providing OpenGov with access to the API and/or access to technical staff from that vendor.
    - Access to a test instance of the third party API including a URL, authentication credentials, and relevant documentation.
    - Changes to scope resulting from a change in a third-party vendor's (if applicable) API.
    - Testing expected workflows and data in both test and production environments
  - To display a location on a map, the third party system must be able to provide location data via their API, as shapes or coordinates. Text addresses are limited to populating address fields.

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