

**Scope of Work
for
Procurement Support Services**

Provided under the terms of:

**Master Agreement No. 19-19-05
Participating Addendum for
NASPO ValuePoint
Procurement of Acquisition Support Services Contract
between**

**Civic Initiatives LLC ("Civic Initiatives")
a company incorporated in Texas
with an address at
7000 N Mopac Expwy, Suite 200, Austin, TX 78731**

and

**City of Doral ("Client")
with an address at
8401 NW 53 Terrace Doral, FL 33166**

SECTION 1. UNDERSTANDING

Civic Initiatives will provide on-demand procurement support services to the City of Doral (“Client”) in support of ongoing procurement-related projects on an as-needed basis.

SECTION 2. WORK PLAN

Civic Initiatives will provide on-demand procurement support services in one of two ways: 1) Solicitation Support (Project Type 1), or 2) Strategic Procurement Transformation Services (Project Type 2) as outlined in Attachment A: Formal Project Scopes to the City of Doral in support of ongoing procurement-related projects as needed.

Civic Initiatives will provide onsite and offsite support to the City of Doral Department of Procurement and Asset Management to ensure continued procurement operations in the transition period between the departure of the Director and the hiring of a new Director.

Civic Initiatives will assign an individual qualified as Subject Matter Expert II or higher to serve as lead (“Interim Director”). The selection of the Interim Director shall be subject to Client approval. The Interim Director will be onsite two (2) days per week (inclusive of Council meeting days, which occur on Wednesdays). The remaining three (3) weekdays, the Interim Director will be available virtually to provide support services as may be needed and as further specified herein.

When a project need is identified, the Interim Director will use the Client Portal to enter the project into the Project Tracker. The Interim Director, or Client Support staff as directed by the Interim Director, will complete the required information and attach any supporting documents (e.g., Scope, Project Overview, etc.) to assist Civic Initiatives in properly scoping the project and providing a Level of Effort (LOE) Quote.

Once the project is entered into the Project Tracker, Civic Initiatives will review the project information provided and develop a LOE Quote. The LOE reflects the project's total cost; however, the Client will be invoiced as a Milestone (Project Type 1) or Deliverable (Project Type 2) project as described in Attachment A. Levels of Effort are all-inclusive and establish a fixed price for the project.

LOEs shall be submitted to the Client’s City Manager or designee for approval prior to commencement of the subject assignment.

SECTION 3. CLIENT SUCCESS

At the core of our commitment to client satisfaction is our Client Success team, a distinctive value-added service that stands as a testament to our dedication to project success.

Directly reporting to Civic Initiative's CEO, Client Success works to ensure the success of individual projects and focuses on the long-term nurturing of client relationships.

As part of the Client Success experience, the Client may be asked to participate in a Client Initiation meeting that serves as a handoff to the Civic Initiative's project team. Client Success will also meet with the Client PM throughout the project to solicit candid feedback and capture the project story in written form.

A dedicated Client Success Representative will be assigned to the project. In addition, the Client Success team may be reached at any time via email at clientsuccess@civicinitiatives.com.

SECTION 4. PAYMENT TERMS

All work under this SOW will be performed and invoiced at the current hourly rates provided in the NASPO Master Agreement No. 19-19-05.

Notwithstanding the foregoing, the parties agree that the fully burdened hourly rate for the first 208 hours of on-site support by the Interim Director shall not exceed a cost of \$196.32 per hour. Additionally, the fully burdened hourly rate for the first 296 hours of off-site support shall not exceed the lesser of \$180.41 per hour or the hourly rates specified in the NASPO Master Agreement No. 19-19-05.

Monthly invoices for Milestones completed in the previous month will be submitted to the client. For Deliverables, the Client will be invoiced for those Deliverables that have been accepted in accordance with the Project Type 2 Acceptance Criteria and Process in Attachment A. Clients will be invoiced no more frequently than once per month, Not To Exceed \$100,000. Initial work will be performed up to a maximum value of \$30,000 until approval is received from the City of Doral Council.

For onsite work, Civic Initiatives will utilize ONSITE rates for project resources found in the NASPO ValuePoint Master Agreement.

All payments will be made within thirty (30) Calendar Days of receipt and acceptance of a proper invoice that includes all required information. If an invoice does not meet requirements, the Client will send written notice with the improper invoice within ten (10) calendar days after receipt of the invoice. The notice will contain a description of the defect and any additional information needed to correct the invoice.

SECTION 5. SIGNATURES

This SOW is subject to the terms set forth in the NASPO ValuePoint Master Agreement No. 19-19-05 between Civic Initiatives and the City of Doral. This SOW is effective on the Execution Date (date executed by Client on Signature Page below). Changes to this SOW will be valid

only through an Amendment as permitted by the Master Agreement and only if the Amendment is signed by both Parties.

<p>By Client</p> <p><i>Client authorizes Contractor to provide services to Client and agrees to pay Civic Initiatives as described in this SOW:</i></p>	<p>By Civic Initiatives</p> <p><i>Civic Initiatives agrees to provide services as described in this SOW:</i></p>
<p>_____</p> <p>Authorized Signatory (Signature)</p>	<p>_____</p> <p>Authorized Signatory (Signature)</p>
<p>_____</p> <p>Authorized Signatory (Printed)</p>	<p>_____</p> <p>Authorized Signatory (Printed)</p>
<p>Date:</p>	<p>Date:</p>

ATTACHMENT A: FORMAL PROJECT SCOPES

PROJECT TYPE 1: SOLICITATION SUPPORT

The following provides an overview of tasks Civic Initiatives will execute for any given assigned procurement project based on a Milestone Level of Effort (LOE) Quote. All individual solicitation projects will be scoped, and a LOE Quote will be provided to the Client through the Client Project Tracker (See Attachment B) unless an alternative process is established through mutual agreement.

The Client may choose to have Civic Initiatives provide all or some of the following Tasks supporting the Solicitation project. The level of support provided will be determined when the Client and Civic Initiatives meet to discuss the specific project.

Task 1: Project Setup/Kickoff

Civic Initiatives will facilitate a project kickoff meeting with project executives and Client-identified project stakeholders to execute critical planning and contract initiation functions necessary to ensure project success. The meetings will focus on identifying the project manager and stakeholders, validating the project scope and timeline, and reviewing key deliverables. Civic Initiatives will also coordinate with the client project manager to collect reports, documents, and data relevant to the project to begin familiarizing ourselves with key aspects of the project.

Task 2: Current State Discovery

The Current State Discovery phase contains tasks necessary to review key aspects of the procurement category, including any contracts currently in place, to establish a baseline prior to developing recommendations for optimization and a procurement strategy. The focus will be on reviewing and assessing all relevant data, documentation, and reports and the performance of interviews with identified stakeholders. Key tasks include:

- Identify, collect, and review additional key documents related to the contract category
- Facilitate interviews with identified stakeholders to discuss the current contract and approach
- Facilitate interviews with identified stakeholders to discuss the pros and cons of the current contract and approach
- Facilitate interviews with identified stakeholders to discuss State and Federal policies, processes or programs impacting the contracts
- Facilitate interviews with identified stakeholders to discuss additional considerations for current contracts

Task 3: Solution Definition & Stakeholder Engagement Workshops

Civic Initiatives will perform the following tasks to facilitate the identification of Client goals, objectives, business requirements, and service delivery strategies toward the establishment of a clear definition of the need for the project. Key tasks include:

- Host a workshop with Client identified executives, management, and staff to capture and document solicitation goals, objectives, and outcomes
- Host stakeholder workshops with Client-identified executives, management, and staff to gather information regarding Business Requirements
- Compile information gathered from stakeholders to direct future requirements development activities

Task 4: Market Research & Procurement Strategy Development

Civic Initiatives will complete tasks necessary to leverage the Current State Benchmark Briefing and the Solution Definition to assess gaps, identify opportunities for improvement, and assess peer and industry best practices toward the development of a procurement strategy, incorporating opportunities for contract optimization. Tasks include, but are not limited to:

- Provide business intelligence by collecting, standardizing, and enriching transactional spend data
- Compare the current state findings to identified solution definition in order to identify gaps
- Perform market research for the relevant procurement category
- Compare and contrast the contracting approach of the Client to peers
- Compare and contrast the contracts and contracting approach of the Client to applicable leading practices
- Develop recommendations for solicitation and contract optimization/risk mitigation strategies that seek to address identified gaps

Task 5: Requirements Development

Civic Initiatives will utilize market research performed and work performed to date to develop an initial requirements document (e.g., Specification or Scope of Work) for feedback from the Client. Feedback received from the Client will be reviewed and incorporated. Civic Initiatives will work with the Client to rectify any issues or concerns before providing a final version for use in the solicitation.

Task 6: Solicitation Development

Civic Initiatives will develop a draft Solicitation Document aligned to the Procurement Strategy and Requirements utilizing a Client-provided standard solicitation template to compile required solicitation elements. Civic Initiatives will prepare and present the details of the draft solicitation document in a meeting with the Client to provide an overview of the solicitation and solicit feedback. Feedback from the Client will be incorporated into a final draft deliverable. Civic Initiatives will then support the Client in executing required governance and review processes and support iteration of the document content, as required. In addition, Civic Initiatives will develop and/or compile any required supporting forms, templates or attachments for inclusion in the solicitation.

NOTE: It is expected that the final details required to finalize a Solicitation Document and advertise it to the market will be completed by the Client.

Task 7: Solicitation Execution Support

Civic Initiatives will provide subject matter expertise and support to the Client in the execution phase of the acquisition event including:

- Support for responding to supplier inquiries regarding the acquisition event
- Support to draft revised solicitation content based on supplier inquiries and/or responses (as required)
- Support to draft solicitation addenda (as required)
- Support to draft an evaluation model and supporting evaluation tools

Task 8: Solicitation Evaluation Support

Civic Initiatives will provide subject matter expertise and support in the review and evaluation of proposals and system demonstrations to provide the evaluation team with an assessment of functionalities, capabilities, strengths/weaknesses, implementation methodologies, support methodologies, and other relevant items in the context of requirements and project objectives.

NOTE: As an SME Civic Initiatives cannot be an active scoring evaluator of the solicitation responses.

Task 9: Contract Development & Execution Support

Civic Initiatives will provide subject matter expertise and support in developing a contract with the awarded contractor(s). Civic Initiatives will review the proposed contract and provide recommended improvements in key areas to help the Client obtain the outcome it seeks under the most favorable terms.

PROJECT TYPE 2: STRATEGIC PROCUREMENT TRANSFORMATION SERVICES

On a Deliverable basis, the Client may request Strategic Procurement Transformation Services to include, but not be limited to:

- Program Assessments
- Program Optimization
- Policy/Process Redesign
- Job Aide/Template Design and Development
- Training and Certification Program Development

Unless an alternative process is established through mutual agreement, all individual projects will be scoped and confirmed in the Client Project Tracker (See Attachment B).

Civic Initiatives will provide Project-specific Work Plans to be attached and incorporated herein. Upon Client approval, Civic Initiatives will coordinate project work with the Client.

Deliverable Based Projects – Acceptance Criteria and Process

All Project Type 2 work performed under this SOW will be detailed and agreed to in the request process outlined in the Work Plan Section. The following provides an overview of the acceptance criteria and process.

- **Initial Draft:** Civic Initiatives will provide the Client with an Initial Draft Version with instructions for the Client to provide feedback.
- **Client Feedback:** The client will have ten (10) business days to provide Civic Initiatives with feedback.
- **Final Draft:** Upon receipt of feedback from the Client, Civic Initiatives will incorporate feedback, reconciling any feedback as necessary with the Client. Civic Initiatives will provide a Final Draft for Acceptance within three (3) business days.
- **Acceptance:** Should Civic Initiatives not receive additional feedback or the Acceptance Document within five (5) business days, Civic Initiatives will consider the Deliverable accepted by the Client and will submit an invoice for the Deliverable to the Client. In any event, Civic Initiatives and Client agree to work together on any reasonable concerns that may arise to ensure the Deliverable meets client expectations.

PROJECT TYPE 3: CONTRACT COMPLIANCE SUPPORT

The following provides an overview of tasks Civic Initiatives will execute for any given assigned procurement project based on a Milestone Level of Effort (LOE) Quote. All

individual solicitation projects will be scoped, and a LOE Quote provided to the Client through the Client Project Tracker (See Attachment B) unless an alternative process is established through mutual agreement.

The Client may choose to have Civic Initiatives provide all or some of the following Tasks supporting the Solicitation project. The level of support provided will be determined when the Client and Civic Initiatives meet to discuss the specific project.

Task 1: Project Setup/Kickoff

Civic Initiatives will facilitate a project kickoff meeting with project executives and Client-identified project stakeholders to execute critical planning and contract initiation functions necessary to ensure project success. The meetings will focus on identifying the project manager and stakeholders, validating the project scope and timeline, and reviewing key deliverables. Civic Initiatives will also coordinate with the client project manager to collect reports, documents, and data relevant to the project to begin familiarizing ourselves with key aspects of the project.

Task 2: Current State Discovery

The Current State Discovery phase contains tasks necessary to review key aspects of the procurement category, including any contracts currently in place, to establish a baseline prior to developing recommendations for optimization and a procurement strategy. The focus will be on reviewing and assessing all relevant data, documentation, and reports and the performance of interviews with identified stakeholders. Key tasks include:

- Identify, collect, and review additional key documents related to the contract category
- Facilitate interviews with identified stakeholders to discuss the current contract and approach
- Facilitate interviews with identified stakeholders to discuss the pros and cons of the current contract and approach
- Facilitate interviews with identified stakeholders to discuss State and Federal policies, processes or programs impacting the contracts
- Facilitate interviews with identified stakeholders to discuss additional considerations for current contracts

[End of Attachment A]