AGREEMENT FOR CONSULTING SERVICES

This Agreement for Consulting Services ("Agreement") is made and entered into in the State of Texas this 18th day of January, 2022, by and between the City of Keller, a municipal corporation ("City"), and Sciens LLC ("Consultant").

WHEREAS, the City desires to hire the Consultant to perform certain consulting services specified herein; and

WHEREAS, the Consultant represents that the Consultant and/or the Consultant's personnel have the qualifications and experience to properly perform such services:

NOW, THEREFORE, the City and the Consultant hereby agree as follows:

1. Scope of Services
   Consultant shall furnish the City with professional consulting services as more particularly set forth in Exhibit A, Proposal and Scope of Services, attached hereto and incorporated by this reference in full herein.

2. Method of Performing Services
   Subject to the terms and conditions of this Agreement, the Consultant may determine the method, details, and means of performing the services described herein.

3. Standard of Performance
   Consultant agrees to undertake and complete these services to conclusion, using that standard of care, skill, and diligence normally provided by a professional person in the performance of similar consulting services.

4. Non-Exclusive Services
   This Agreement shall not be interpreted to prevent or preclude Consultant from rendering any services for Consultant's own account or to any other person or entity as Consultant in its sole discretion shall determine. Consultant agrees that performing such services will not materially interfere with services to be performed for the City.

5. Coordination of Services
   All services are to be coordinated with the City of Keller Director of Community Development or designee ("Project Manager") and shall be performed under the general direction of the Project Manager.

6. Place of Work
   Consultant shall perform the services provided for in this Agreement at any place or location and at such times as the Consultant shall determine.

7. Principal in Charge

Consultant will designate one of its Partners as its principal-in-charge and person responsible for necessary coordination with Project Manager.

8. Permits, Licenses, Certificates

Consultant, at Consultant's sole expense, shall obtain and maintain during the term of this Agreement, all permits, licenses, and certificates required in connection with the performance of services under this Agreement.

9. City's Responsibility

City shall cooperate with Consultant as may be reasonably necessary for Consultant to perform its services. Project Manager agrees to provide direction to Consultant as requested regarding particular project requirements.

10. Term of Agreement

This Agreement shall begin upon approval by the City.

11. Termination

a. This Agreement may be terminated by City if Project Manager notifies Consultant, in writing, of Project Manager's desire to terminate the Agreement. Such termination shall be effective ten calendar days from the date of delivery or mailing of such notice. City agrees to pay Consultant in full for all amounts due Consultant as of the effective date of termination, including any expenditures incurred on City's behalf, whether for the employment of third parties or otherwise.

b. This Agreement may be terminated by Consultant if Consultant notifies Project Manager, in writing, of Consultant's desire to terminate the Agreement. Such termination shall be effective ten calendar days from the date of delivery or mailing of such notice and only if all assignments accepted by Consultant have been completed prior to the date of termination.

12. Compensation

a. City agrees to pay Consultant in a not-to-exceed amount for services, including expenses, provided under this Agreement at rates provided in Exhibit B, Project Costs, attached hereto and incorporated by this reference in full herein.

b. The acceptance by Consultant of the final payment made under this Agreement shall constitute a release of City from all claims and liabilities for compensation to Consultant for anything completed, finished or relating to Consultant's services.

c. Consultant shall provide Project Manager with a completed Request for Taxpayer Identification Number and Certification as issued by the Internal Revenue Service (IRS Form W-9).

d. If any sales tax is due for services performed by Consultant or materials or products provided to City by Consultant, Consultant shall pay the sales tax. City shall not reimburse Consultant for sales taxes paid by Consultant.

13. Method of Payment

a. City agrees to pay Consultant for the completion of each work element as identified in the Exhibit B, Project Costs, attached hereto and incorporated by this reference in full herein.

14. Responsibility for Expenses

Except as otherwise expressly provided in this Agreement, City shall not be responsible for expenses incurred by Consultant in performing services under this Agreement. All expenses incident to the performance of services under this Agreement shall be borne by the Consultant, including, but not limited to rent, vehicle, and travel, entertainment and promotion, general liability and health insurance, workers' compensation insurance, and all compensation and benefits of employees or agents engaged by Consultant. Consultant shall, at its own cost and expense, supply all personal property necessary or appropriate to perform the services provided for under this Agreement, including, but not limited to any personal property used by employees and agents of Consultant in the performance of such services.

15. Non-Appropriation of Funds

Payments to be made to Consultant by City for services performed within the current fiscal year are within the current fiscal budget and within an available, unexhausted and unencumbered appropriation of City. In the event City does not appropriate sufficient funds for payment of Consultant's services beyond the current fiscal year, this Agreement shall cover payment for Consultant's services only up to the conclusion of the last fiscal year in which City appropriates sufficient funds and shall automatically terminate at the conclusion of such fiscal year.

16. Records

a. At City's request, City shall be entitled to immediate possession of, and Consultant shall furnish to Project Manager within ten days, all of the project deliverables. Consultant may retain copies of these documents.

b. Any substantive modification of the documents and materials by City staff or any use of the completed documents and materials for other City projects, or any use of uncompleted documents and materials, without the written consent of Consultant, shall be at City's sole risk and without liability or legal exposure to Consultant. City agrees to hold Consultant harmless from all damages, claims, expenses and losses arising out of any reuse of the documents and materials for purposes other than those described in this Agreement, unless Consultant consents in writing to such reuse.

17. Confidentiality of Information

Any documents and materials given to or prepared or assembled by Consultant under this Agreement shall be confidential and shall not be made available to any third person or organization by Consultant without prior written approval of the Project Manager.

18. Indemnity

Consultant agrees to indemnify, hold harmless and defend City, its City Council, and each member thereof, and every officer, employee, representative or agent of City, from any and all liability, claims, demands, actions, damages (whether in contract or tort, including personal injury, death at any time, or property damage), costs and financial loss, including all costs and expenses and fees of litigation or arbitration, that arise directly or indirectly from any acts or omissions related to this Agreement performed by Consultant or its agents, employees, subconsultants, subcontractors, consultants and other persons acting on Consultant's behalf. This agreement to indemnify, hold harmless and defend shall apply whether such acts or omissions are the product of active negligence, passive negligence, or acts for which Consultant or its agents, employees, subconsultants, subcontractors, consultants and other persons acting on Consultant's behalf would be held strictly liable.

19. Insurance

   a. Consultant shall obtain and maintain during the performance of any services under this Agreement the insurance coverages as specified in Exhibit C, attached hereto and incorporated herein by this reference, issued by a company satisfactory to the Risk Manager, unless the Risk Manager waives, in writing, the requirement that Consultant obtain and maintain such insurance coverages.

   b. Consultant shall, prior to performance of any services, file with the Risk Manager evidence of insurance coverage as specified in Exhibit C. Evidence of insurance coverage shall be forwarded to the Risk Manager, addressed as specified in Exhibit C.

   c. Maintenance of proper insurance coverages by Consultant is a material element of this Agreement. Consultant's failure to maintain or renew insurance coverages or to provide evidence of renewal may be considered as a material breach of this Agreement.

20. Independent Contractor

   a. City and Consultant agree that in the performance of the services, Consultant shall be, and is, an independent contractor, and that Consultant and its employees are not employees of City. Consultant has and shall retain the right to exercise full control over the employment, direction, compensation and discharge of all persons assisting Consultant.

   b. Consultant shall be solely responsible for, and shall save City harmless from, all matters relating to the payment of Consultant's employees, agents, subcontractors and subconsultants, including compliance with social security requirements, federal and State income tax withholding and all other regulations governing employer-employee relations.

   c. Consultant acknowledges that Consultant and Consultant's employees are not entitled to receive from City any of the benefits or rights afforded employees of City, including but not limited to reserve leave, sick leave, vacation leave, holiday leave, compensatory leave, Public Employees Retirement System benefits, or health, life, dental, long-term disability and workers' compensation insurance benefits.

21. Consultant Not Agent

Except as Project Manager may specify in writing, Consultant, and its agents, employees, subcontractors and subconsultants shall have no authority, expressed or implied, to act on behalf of City in any capacity, as agents or otherwise, or to bind City to any obligation.

22. Conflict of Interest

Consultant shall promptly inform Project Manager of any contract, agreement, arrangement, or interest that Consultant may enter into or have during the performance of this Agreement that may conflict with City's interests. This requirement includes contracts, agreements and arrangements with manufacturers, suppliers, contractors or other clients whose interests might be served by the services performed under this Agreement and Consultant's or Consultant's clients' interest in land that might be affected by the services. Consultant shall take such measures as are necessary in the performance of this Agreement to prevent actual or appearances of conflicts of interest.

23. Assignability of Agreement

Consultant agrees that this Agreement contemplates personal performance by Consultant and is based upon a determination of Consultant's personnel's unique competence, experience and specialized personal knowledge. Assignments of any or all rights, duties, or obligations of Consultant under this Agreement will be permitted only with the express written consent of Project Manager, which consent may be withheld for any reason.

24. Successors and Assigns

Consultant and City agree that this Agreement shall be binding upon and inure to the benefit of the heirs, executors, administrators, successors and assigns of Consultant and City.

25. Fair Employment Practices

a.   Consultant agrees that all persons employed by Consultant shall be treated equally by Consultant without regard to or because of race, color, religion, ancestry, national origin, disability, sex, marital status, age, or any other status protected by law, and in compliance with all antidiscrimination laws of the United States of America, the State of Texas, and City of Keller.

b.   Consultant agrees that, during the performance of this Agreement, Consultant and any other parties with whom Consultant may subcontract shall adhere to equal opportunity employment practices to assure that applicants and employees are treated equally and are not discriminated against because of their race, color, religion, ancestry, national origin, disability, sex, marital status, age, or any other status protected by law.

c.   Consultant agrees to state in all of its solicitations or advertisements for applicants for employment that all qualified applicants shall receive consideration for employment without regard to their race, color, religion, ancestry, national origin, disability, sex, marital status, age, or any other status protected by law.

26. Force Majeure

Consultant and City agree that neither City nor Consultant shall be responsible for delays or failures in performance resulting from acts beyond the control of either party. Such acts shall include, but not be limited to acts of God, strikes, lockouts, riots, acts of war, epidemics, governmental regulations imposed after this Agreement was executed, fire, communication line failures, tornado, earthquakes, or other disasters.

27. Covenants and Conditions

Consultant and City agree that each term and each provision of this Agreement to be performed by Consultant shall be construed to be both a covenant and a condition.

28. Governing Law

City and Consultant agree that the construction and interpretation of this Agreement and the rights and duties of City and Consultant hereunder shall be governed by the laws of the State of Texas.

29. Compliance with Laws

Consultant agrees to comply with all City, State, and federal laws, rules, and regulations, now or hereafter in force, pertaining to the services performed by Consultant pursuant to this Agreement.

30. Severability

City and Consultant agree that the invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision.

31. Waiver

City and Consultant agree that no waiver of a breach of any provision of this Agreement by either Consultant or City shall constitute a waiver of any other breach of the same provision or any other provision of this Agreement. Failure of either City or Consultant to enforce at any time, or from time to time, any provision of this Agreement, shall not be construed as a waiver of such provision or breach.

32. Counterparts

City and Consultant agree that this Agreement may be executed in two or more counterparts, each of which shall be deemed an original.

33. Expenses of Enforcement

Consultant and City agree that the prevailing party's reasonable costs, attorneys' fees (including the reasonable value of the services rendered by the City Attorney Office) and expenses, including investigation fees and expert witness fees, shall be paid by the non-prevailing party in any dispute involving the terms and conditions of this Agreement.

34. Authority to Execute

a. City acknowledges that the person executing this Agreement has been duly authorized by the City Council to do so on behalf of City.

b. Consultant acknowledges that the person executing this Agreement has been duly authorized by Consultant to do so on behalf of Consultant.

35. <u>Notices</u>

      a. Any notices to Consultant may be delivered personally or by mail addressed to Sciens LLC, 5900 South Lake Forest Drive, Suite 300, McKinney, Texas 75070.

      b. Any notices to City may be delivered personally or by mail addressed to City of Keller Community Development Department, located at 1100 Bear Creek Parkway, Keller, TX 76248, attention Julie Smith, Director of Community Development.

36. <u>Amendment</u>

City and Consultant agree that the terms and conditions of the Agreement may be reviewed or modified at any time. Any modifications to this Agreement, however, shall be effective only when agreed to in writing by both Project Manager and Consultant.

37. <u>Entire Agreement</u>

City and Consultant agree that this Agreement constitutes the entire agreement of the parties regarding the subject matter described herein and supersedes all prior communications, agreements, and promises, either oral or written.

EXECUTED this 18th day of January, 2022.

City of Keller, Texas

By: _____ (signature)

      Mark R. Hafner

      City Manager

EXECUTED this ____ day of _____, 20___.

Sciens LLC

By: _____ (signature)

      _____Ernest Pages_____ (printed)

      _____Partner_____ (title)

THE CITY OF KELLER, TX

Proposal and scope of services to provide consultant services: COMMUNITY DEVELOPMENT SYSTEM SOLUTION SELECTION

January 05, 2022

Sciens LLC
5900 S. Lake Forest Drive, Suite 300
McKinney, Texas 75070

Contact:
Stephen Gousie, Partner
sgousie@sciens.com
(469) 424-3415
www.sciens.com

December 20, 2021

City of Keller, Texas
Attn: Ms. Smith, Director of Community Development
1100 Bear Creek Parkway
Keller, TX 76248

Dear Ms. Smith:

Thank you for the opportunity to discuss the City's needs last week. Based upon our discussion, Sciens has developed this proposal to provide consultant services for the selection of a Community Development system solution. We are eager to contribute our expertise and support to ensure a successful transition for the City.

Sciens is a highly-specialized management consulting firm headquartered in McKinney, Texas that has dedicated itself to serving the needs of local governments like the City of Keller. We are able to provide our customers with personal service and dedicated attention not available in the larger, more impersonal consulting firms. Just ask our customers…they know the difference.

Because of our commitment to the local government market, we understand the unique demands that local government faces. From Finance to Community Development, we know your business. We have extensive experience with replacing integrated municipal systems, including permitting, plan review, building inspections, and code enforcement functionality. We are also experienced in the replacement of ERP systems, asset management, public safety communications, law and fire records management systems, and dispatch systems. We provide guidance on GIS, best practice infrastructures, data warehousing, transparency and analytics, and mobility. Most importantly, we understand how these systems need to work together to provide the City with the data and information it needs to manage in today's dynamic environment.

Sciens will be your champion throughout this process, working with your operational departments to provide an independent analysis of your core Permitting/ Inspection software architecture and configuration, a thorough understanding of its functionality and limitations, and a strongly developed RFP designed for the City. As one of the firm's owners, you have my commitment that your project will achieve these goals, and we will do it within the schedule defined, and the budget allotted. Sciens has no vendor affiliations, relationships or preferences and will act in an unbiased manner as we assist the City.

The attached proposal details the scope of work in response to your request for proposal. Please feel free to contact me at sgousie@sciens.com or (469) 424.3415 with any questions. We look forward to working with the City of Keller on this important project.

Respectfully submitted,

STEPHEN GOUSIE
Partner, Sciens LLC
5900 South Lake Forest Drive, Suite 300
McKinney, Texas 75070
Direct phone: (469) 424-3415
sgousie@sciens.com

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SECTION 1: COMPANY PROFILE

Get to know our QUALIFICATIONS
expert level KNOWLEDGE & years of EXPERIENCE

COMPANY OVERVIEW

Sciens LLC (www.sciens.com) is a management consultancy with an information technology (IT) competency headquartered in McKinney, Texas, serving non-profit and public-sector clients throughout the United States and Canada. The company was formed in 1989 to support the management and IT consulting needs of local government, non-profit and private sector companies, and has retained the same executive team since its inception. We have a staff of consultants with years of expertise in the government sector. If selected for this plan, three consultants will be working with the City.

Sciens partners are seasoned industry experts with over 60 year of combined technology management experience. We specialize in incorporating innovative, yet feasible solutions in all of our plans. Through our research-based methodology, Sciens consultants clearly understand management and user operational needs, analyze alternatives and determine the highest value and lowest risk options. We have assisted our clients in project managing numerous technology deployments. Our plans are fully implementable since they are tempered with real world experience.

Government agencies face business challenges on a scope far greater than any business in the private sector. The broad range of services delivered to the community with minimal funding, while facing political obstacles daily, is an environment that few businesses can comprehend. As more complex technologies are adopted, quality management systems are needed to ensure that enterprise systems are aligned – and not in conflict – with the goals of the organization.

Sciens Consulting is **a truly independent technology consulting firm.** We perform all work in an objective and a **vendor neutral** capacity. The company has no ties to the vendor community and only provides independent services. This way, there is no risk that our assessment will be biased in any way towards certain products or solutions.

Sciens is comprised of experienced management and technology professionals with advanced degrees and a large catalogue of industry certifications and credentials. Our team consists of management specialists and industrial engineers experienced in government operations with a deep understanding of how to enhance operational functions.

> " Sciens brings innovative solutions to managing organizations and data – delivered with the true spirit of partnership.
>
> — James Brown, CIO
> Waco, Texas

Our consultants stay current in the latest industry trends through participation in key certification programs and educational forums including:

GFOA – Government Finance Officers Association Implementing Best Practices	
PMI – Project Management Institute Certified Project Management Professionals	
ISACA – Information Systems Audit and Control Association Certified Information Systems Auditor (CISA) and Certified in Governance of Enterprise IT (CGEIT)	
Alliance for Innovation Exclusive Technology Strategic Planning Partners	
**TML	TAGITM** Developed and presented strategic governance plan model	
MCSE – Microsoft Certified Professional Certified Systems Engineer	
ITIL – Information Technology Infrastructure Library V3 and Foundation Certified	
IEE – Institute of Industrial and Systems Engineers Registered Member	
FEMA – Federal Emergency Management Agency Emergency Management Institute	
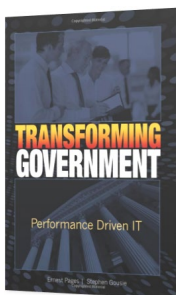
The partners at Sciens are committed to helping our clients work smarter and more efficiently. The founding partners at Sciens co-authored the book, Transforming Government: Performance Driven IT, as a practical guide for local government managers to evaluate process workflows, improve efficiencies, and eliminate redundant and overly complex systems.

EXPERIENCE WITH LOCAL GOVERNMENT PUBLIC SECTOR

Sciens project teams have an extensive history working with local government customers to assess their management practices and IT needs, develop plans based on sound, proven solutions, and successfully guide the systems procurement process from conception through implementation.

Below is a summary of some of our recent clients where Sciens Consulting has performed assessments, planned for technology change, assessed functional requirements, developed RFPs, evaluated vendors, selected software/systems, and negotiated contracts, demonstrating our capability to help align technology with business needs for the Keller. In every project, we have thoroughly reviewed all relevant organizational application systems. In addition to Community Development systems, we have worked with a wide range of forward-looking municipal technology initiatives, including automatic meter reading, regional traffic signal networks, business intelligence and data warehousing, transparency and self-service, public safety systems, and cloud-based infrastructure.

- Ada, OK
- Alachua County, FL
- Allen, TX
- Amarillo, TX
- Bi-County Police Information Network, WA
- Burleson, TX
- Cedar Park, TX
- Charlotte, NC
- Citibank
- Collier County, FL
- Collin County, TX
- Columbia, MO
- Columbus, OH
- Conroe, TX
- Dallas County, TX
- Danville, VA
- Deer Park, TX
- Delray Beach, FL
- DeSoto, TX
- Ector County, TX
- Fort Lauderdale, FL
- Franklin & Benton Counties, WA
- Gilbert, AZ
- Greene County, MO
- Hastings, NE
- Hialeah, FL
- Hillsborough County, FL
- Indianapolis, IN
- Irving, TX

- Jacksonville Beach, FL
- Jupiter, FL
- Jupiter and Palm Beach Gardens, FL
- Keller, TX
- Kennewick, WA
- Lancaster, TX
- Lincoln, MA
- Loveland, CO
- Martin County, FL
- Maui County, HI
- McKinney, TX
- Mesa, AZ
- Miami International Airport, FL
- Norcross, GA
- Norman, OK
- North Richland Hills, TX
- North Central Texas Council of Governments
- Northampton County, PA
- O'Hare International Airport, IL
- Odessa, TX
- Onondaga County and Syracuse, NY
- Owensboro, KY
- Oxnard, CA
- Palm Beach Sheriff's Office, FL
- Palm Beach, FL

- Parkland, FL
- Pearland, TX
- Plano, TX
- Plantation, FL
- Polk County, FL
- Pompano Beach, FL
- Port Arthur, TX
- Prosper, TX
- Richardson, TX
- Richland, WA
- Sony Corporation
- Southlake, TX
- Spartanburg County Parks & Rec Commission, SC
- St. Petersburg, FL
- Sugarland, TX
- Sun Prairie, WI
- Sunrise, FL
- Syracuse, NY
- Truckee, CA
- Universal Studios, Japan
- University Park, TX
- Victoria, BC, Canada
- Waco, TX
- Wayne County Probate Court, FL
- Westminster, CA
- Wichita Falls, TX
- Wilmette County, IL
- Wylie, TX
- Yuma, AZ

SECTION 2: THE SCIENS TEAM
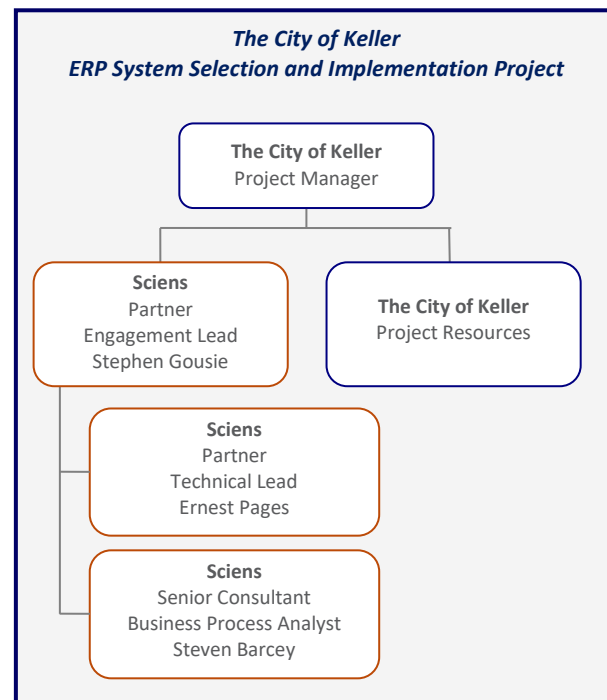
EXPERIENCED & KNOWLEDGEABLE

Sciens has worked with many public, private and non-profit organizations throughout the years. Although every client is facing a unique set of challenges, there are many common threads that every business confronts. Isolated systems or redundant processes can slow an organization or increase costs. We bring a fresh perspective to assess environments and recommend practical solutions to improve performance.

PROJECT TEAM

The first step for a successful project is to assemble the best team possible to execute the work and provide an efficient and effective framework for accomplishing the project. In our experience, the greatest teams function as a true partnership based on trust and respect. As shown in the adjoining project structure, our goal is to become part of your project management team while providing a formal arrangement for accomplishing the work.

If awarded the City of Keller project, Stephen Gousie, Partner at Sciens, would serve as the primary engagement lead and lead business consultant. Ernest Pages will serve as technical lead for the project; he brings a wealth of technical and business experience working with municipalities, including the City of Keller. Additional support for the project will be provided by Steven Barcey, Senior Consultant at Sciens, who will analyze the key system requirements and assist in the development of the request for proposal and analysis of vendor responses.

All three team members are available for the duration of the selection process, while Stephen Gousie and Ernest Pages will be available to lead for on-site meetings, presentations, and project management advisory for the duration of the ERP implementation process. We are 100% committed to the success of the project and ensure the City gets a system that is functional, with better workflows, leading to greater efficiency. Working with City management and end users, the Sciens team provides leadership and execution expertise to ensure the project stays within budget and schedule.

The City of Keller
ERP System Selection and Implementation Project

The City of Keller
Project Manager

Sciens
Partner
Engagement Lead
Stephen Gousie

The City of Keller
Project Resources

Sciens
Partner
Technical Lead
Ernest Pages

Sciens
Senior Consultant
Business Process Analyst
Steven Barcey

PROJECT MANAGEMENT, COORDINATION AND COMMUNICATION

Effective and efficient project management is a carefully planned and organized effort to accomplish a specific effort. It begins with development of a project plan which is a baseline tool for the project and includes defining project goals and objectives, specifying tasks and how goals will be achieved, what resources are needed, and associating budgets and timelines for completion. It also includes implementing the project plan, along with careful controls to manage the "critical path" to ensure the project is being managed according to plan. The Sciens team will communicate with you every step of the way, informing the project manager of upcoming deliverables, meetings and review sessions. Detailed on the few pages are the resumes of the proposed project team that will be working with the City.

SUMMARY

Stephen is a nationally recognized expert in project management, business process analysis and reengineering. His specialization is the use of technology to streamline operations and service delivery. He has led project teams on hundreds of projects for both the public and private sectors. Stephen has managed projects in strategic planning and integrated systems definition and acquisition, including those involving web services, client server and legacy integration.

Prior to founding Sciens Consulting, Stephen served as a strategic programs manager for NEC Solutions America, Niteo Partners and Zefer Consulting. He was managing director and senior consultant for Information Mapping, business analyst for the U.S. Customs Service, and assistant controller for the Water Pollution Control Federation.

REPRESENTATIVE PROJECTS

Enterprise Resource Planning:
Conducted extensive analysis of user needs in the context of Municipal ERP system vendors' market capabilities. As part of the scope, he developed specifications and Requests for Proposal, and assisted clients with vendor selection and contract negotiations.

Provided project management, vendor management, and risk management assistance during implementation of several Municipal ERP Systems: Finance, Human Resources, Utility Billing, Community Development, Work Order/Asset Management, Citizen Portals, Courts.

Managed project team on ERP system needs definition, selection, implementation and training for system at a Fortune 100 petrochemical company.

Public Safety System Design, Selection & Implementation:
Conducted extensive analysis of user needs in the context of Computer Aided Dispatch (CAD), Law Records/Mobile, Fire Records/Mobile, and Jail/ Detention vendors' market capabilities. Included specifications development, Requests for Proposal preparation, as well as assisting with vendor selection, contract negotiation and implementation.

Business Process Reengineering:
Lead business analyst and project manager for team that analyzed municipal business processes, identified improvement opportunities, documented, and trained new processes.

Specialties
Project Management
Business Process Reengineering
Strategic Planning
Systems Implementation
Vendor Management
Technology Acquisition

Education
Lesley University, Graduate School of Arts & Sciences
Masters of Science in Management
The George Washington University – Columbian College *Bachelors of Arts in Economics*

Professional Certifications
Project Management Professional (PMP #1324565)
Certified Process Design Engineer (CPDE)
EXIN Certified in IT Information Library (ITIL)

Publications / Speaking Engagements
Co-authored book, Transforming Government – Performance Driven IT
2018 Speaker at ICMA Workshop: *Citizen Portal – Window into the SmartCity of the Future*
2017 Speaker at Texas Association of Government IT Managers (TAGITM) annual conference: *You Are Not Alone: ERP Faces a New Era*

ERNEST PAGES, PARTNER

SUMMARY

Ernest is an internationally recognized expert with over 25 years of experience in operations management and planning. He has advised private and public-sector CIO's and CEO's on strategic operations improvements through financial, work process and technology. He balances technical depth and business savvy to create effective implementations.

Prior to founding Sciens Consulting, Ernest served as management consultant at Deloitte and Touche. From a technology perspective, he was a software engineer at Siemens Communications, IT manager at Ryder System, systems engineer at Nortel Networks, and design engineer at Stone and Webster Architect Engineers.

REPRESENTATIVE PROJECTS

IT Management Assessment & Planning:
Conducted detailed reviews of multiple IT organizations using COBIT and ITIL best practices. Subsequently developed new organizational structure, governance mechanisms and technology direction.

IT Disaster Recovery Planning:
Assisted multiple organizations design fault resilient network and system configurations. Designs have planned for the system recovery using technologies, such as virtualization and cloud computing.

Systems Design, Selection & Contract Negotiations:
Analyzed the operations of over 80 public sector organizations, developed RFPs, and assisted with vendor selection, contract negotiation and implementation of integrated systems.

Municipal Business Process Improvement:
Analyzed the operation of many city governments and recommended improvements to the key business processes (e.g. Purchasing, Building Permits, Inspections, Human Resources, Public Works, Citizen Relationship Management).

Geographic Information Systems (GIS) Analysis:
Analyzed the operations of multiple organizations to determine the GIS needs, available data sources, GIS architecture, and support delivery organizational structure. Developed procurement RFP's and assisted in the selection of the optimal GIS integrator.

Specialties
Executive Advisory
Business Planning & Feasibility
Procurement & Contract Negotiation
Business Process Improvement
Implementation Project Management
Technology Management

Education
University of Miami School of Business
Masters of Business Administration
Florida Atlantic University School of Engineering
Bachelors of Science in Mechanical Engineering

Professional Certifications
State of Florida, Engineering EIT Number 481ET259
Certified in the Governance of Enterprise IT (CGEIT)
Certified Information Systems Auditor (CISA)
Microsoft Certified Systems Engineer (MCSE)
Certified in Information Technology Infrastructure Library (ITIL)
FEMA Continuity of Operations (COOP) & Incident Command System (ICS) Planning

Publications / Speaking Engagements
Co-authored book, Transforming Government – Performance Driven IT
Speaker at Texas Association of Government IT Managers (TAGITM) annual conferences

STEVEN BARCEY, SENIOR CONSULTANT

SUMMARY

Steven applies an analytical background in financial economics, risk management, business analysis, statistics and strategic management consulting to provide insightful, practical and effective solutions to local government agencies. He has developed strategic master planning services to a wide range of Cities, demographics and technological maturity. He maintains a consistently fresh view on technology use by keeping up-to-date on emerging technology trends, industry best practices of governance and organization, and the evolving demands of citizens and staff.

Prior to joining Sciens Consulting, Steven worked in risk management consulting at a major data analytics firm and provided consulting services and market risk analysis for major financial institutions on their investment portfolios.

REPRESENTATIVE PROJECTS

Market Analysis:
Provided analysis of leading vendors in the municipal applications environment including ERP systems (e.g., Finance, Human Resources, Work Orders, Asset Management, Community Development, and Citizen Information Systems), Government Transparency and Business Analysis systems, and Parks & Recreations systems. Reviewed the functionality, financial stability, future vision and roadmap, and market penetration of each leading solution.

Municipal Applications Procurement:
Developed procurement documents including optional Cloud-hosting, alternate pricing, City contractual requirements, end user functional requirements, technical environment limitations, and City prioritization. Provided objective evaluation and ranking of proposals, guidance and evaluation of vendor demonstrations, and final recommendations to City Management.

Municipal Process & Data Analysis & Planning:
Analyzed the operation and data management of City departments, reviewing the reliance on paper and decentralized data silos. Provided strategic planning initiatives to digitize and centralize the City's processes and data.

Specialization
Strategic Management Consulting
Risk Management
Systems Analysis, Selection & Procurement
IT Governance
Data Management
Business Process Analysis
Financial Economics
Project Management

Education
University of Texas
Bachelors of Science in Finance and Economics

Recent Clients
Burleson, TX
Conroe, TX
Delray Beach, FL
Hastings, NE
Keller, TX
Kennewick, WA
Martin County, FL
McKinney, TX
North Richland Hills, TX
Owensboro, KY
Oxnard, CA
Plano, TX
Prosper, TX
Southlake, TX
Truckee, CA
Waco, TX
Westminster, CA

SECTION 3: PROJECT SCOPE OF WORK

OVERVIEW

Over the last two decades, there has been a marked shift in how work is performed within local governments, from silo departments with separate functions and outputs, to a system of interlinked processes that cross functions and link organizational activities. Today, with increasingly tight budgets, business units are looking to improve their operation through the use of modern technology.

Community Development (CD) software systems can help cities to achieve these goals. Our consulting team understands that software decisions are business, technical, financial, political, process and organizational decisions. Because these solutions are broad in their scope and reach deep within the organization we work with the organization to include a broad-based group of employees in any selection effort.

Sciens has assisted Local Government Management Teams through this transition; we specialize in streamlining operations and aligning the business needs with the appropriate technology. Our consulting team understands the complexity of this selection. We understand that that the most important criterion is the evaluation of risk associated with any given product and its implementation. As result, our consulting team works with the City's evaluation team to make risk management and risk mitigation key priorities in evaluating different solutions, different implementation methods, different delivery methods and different implementers.

Based on our extensive experience with municipalities, Sciens is proposing to begin with an assessment of the current environment to understand the business objectives that each of the end user groups wants to achieve through this system replacement. Through surveys of and interviews with key personnel, we also identify desired functionality that is commercially available today and viable within the City's technology architecture that can be included in the request for proposal.

The graphic to the right shows a comprehensive municipal Enterprise Resource Planning (ERP) environment. In today's market, however, no single vendor has a best-of-breed capability in all component systems. Municipalities are choosing to either compromise on functionality in certain areas, for the sake of full-integration, or choose multiple vendors' systems and provide that integration for themselves. While the latter places an added burden upon the City's IT Department, it is often the only way for a City to achieve the promise of software efficiencies.

In addition, we look at the core dependent components that are Common Systems to a state-of-the-art ERP system:

- Performance Management
- Document Management
- Dashboarding
- GIS integration.

OUR UNDERSTANDING OF KELLER'S NEEDS

The City of Keller has been utilizing the TRAKiT permitting system since it was implemented several years ago. The system is the core City's permitting, inspection and code administrative systems, providing these functionalities for the City and to its citizens. While this system performs many basic functions well, it is designed for smaller cities and does not provide the City with an integrated platform for growth or modern functionality, such as transparency, advanced analytics, intuitive reporting, integration to external databases, or support to more mobile and e-government environments. The City of Keller was the right client for the software when it was first implemented; however, the City's growth and changing Citizen needs has placed demands on the functionality of the system that it can no longer meet.

In addition to the existing modules provided, the City may be looking to consolidate redundant functionality that is provided by other, non-integrated systems, and expand into modern capabilities. Examples of these are analytical tools for management to access data more efficiently and create intuitive, meaningful reports.

Specifically, the City would like to replace the current TRAKiT Community Development system with one that enables the City to:

- Reduce costs;
- Improve decision making;
- Provide enhanced customer service to both internal and external customers;
- Improve access to information;
- Improve efficiency and effectiveness of business operations;
- Improve accountability.

The City is looking to replace the current software by developing specifications for the desired system, and development of a request for proposal to source a new system. Based on these key project drivers, the City has requested this statement of work to assist with the successful replacement of its current system.

PROJECT PHASE 1: SELECTION OF THE COMMUNITY DEVELOPMENT SYSTEM

The project is conducted using the City's administrative work processes as the guide. Each process is examined for opportunities for streamlining, such as removal of extra steps, signatures, paper generation, duplicate entry and repetitive work. The phase breakdown of our methodology is shown below.

Phase 1.1	Phase 1.2	Phase 1.3	Phase 1.4
Project Management, Data Gathering & Interviews	**Needs Assessment & Plan of Action**	**RFP Development**	**Vendor Evaluation and Selection**

Deliverables:
• Project Charter
• Project Plan and Timeline for Phase I
• Kickoff Presentation
• Data Gathering Toolset
• End User and Management Surveys
• Business Practices and Process Review
• Review of Current Technical Environment and System Status
• Review of ERP System Functionality
• Project Management and Status Reporting
	Deliverables:
	• Initial Budget
	• Timeline Development
	• New System Vision
	• Needs Assessment Report &
	• Plan of Action Report:
	  ✓ Current Technology Environment
	  ✓ System Review Plan
	  ✓ Proposal Management Plan
	  ✓ Implementation Plan
	  ✓ Data Management and Integration
	  ✓ Risk Identification and Analysis
	  ✓ Process Improvements Based on Assessment
	  ✓ List of Required Future Software Features and Functions by Module
		Deliverables:
		• Software and Infrastructure Specifications
		• Request for Proposal Document
		• Proposal Response Forms
		• Selection Criteria, Weightings and Decision Making Process
		• Project Management and Status Reporting
			Deliverables:
			• Vendor Q&A and Pre-Bid Conference
			• Proposal Evaluation Matrix
			• 10-Year Cost Analysis
			• Vendors Proposals Evaluation
			• Vendor Presentation & Demo Proctoring & Evaluation
			• Recommendation of Vendor Award
			• Vendor Negotiations
			  ✓ Contract
			  ✓ License and Support Agreements
			  ✓ Statement of Work

Sciens Assessment and Strategic Technology Planning Methodology

PHASE 1.1 – PROJECT MANAGEMENT, DATA GATHERING AND INTERVIEWS

The purpose of Phase 1.1 of the project is to establish the business context for the system replacement, examine current business practices and processes that need to be maintained or updated, and develop a preliminary budget and timeline for the project.

In Phase 1.1, we examine:

- Reliability of data, queries and reports

- Possible use of ancillary technologies to automate functions, such as: bar coding in inventory control and field automation for data entry/retrieval

- Use of geo-data for address entry/lookup and validation to minimize data entry errors

- Areas of the processes that are subjected to high rates of error due to such things as: open text entry and lack of required field as part of the workflow

- Ability of the current technology to support digital government and self-service transactions, including reporting and dashboarding.

In addition, we examine the business case for and make recommendations to the City regarding possible CD delivery models: on-premise, cloud and hybrid methods, specifically:

- On-Premise: On-premise delivery models assume that businesses license CD software and install it on computers at their location. CD software users are responsible for buying computer hardware and software for these solutions. They are also responsible for applying any software upgrades, patches or fixes provided by the software vendor.

- Cloud Delivery: Cloud delivery models allow the software user to use application software on another firm's computing equipment; in the case of some CD vendors, it runs on their system in their data center. Pricing for these solutions is often done on a monthly basis and may scale up or down based on a customer's usage of the product. This environment also means that software users to do not have to perform software maintenance and upgrade activities with their own internal staff. This could save some organizations from needing to hire additional IT personnel to support their CD software.

- Hybrid Solution: In a hybrid environment, a software vendor can offer multiple methods for deploying the software. It can be used on-premise, hosted on the vendor's cloud or on another firm's cloud. These solutions may also possess the flexibility to go from on-demand to on-premise (and in some cases back to on-demand) to give you the ability to bring an application in-house should they anticipate the need to make modifications that exceed the capabilities of the standard cloud offering.

From this information, we establish business requirements for the system and a budget for the system, including hardware, software, training, business process reengineering, and other professional services. Once a budget has been established, we examine possible payment choices for the City, i.e., buying, leasing, or subscription.

Finally, we work with the City to ensure that the project has an effective project governance structure and a balanced team representing the major functional areas that will be involved in the system definition.

Specifically, this phase involves the following activities:

- City Strategic Direction / Goals – Working with City Management and the key stakeholders of the new system (e.g., Finance Director), Sciens gains an understanding of the City's strategic direction and goals, and how the new system would help to further that direction. We assist in the creation of a vision for the new system and definition of goals the City wants to achieve through implementation.
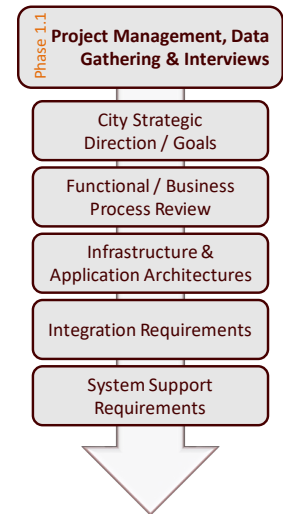
- Business Practices and Process Review – We meet with cross-functional teams consisting of Department representatives knowledgeable in their portion of the business processes typically automated by current, Municipal Operations systems. During these meetings, we capture:
  - o Workflow limitations of the existing system
  - o Transaction volumes to be supported by the new system
  - o Interfaces of the current system which translate into functionality that needs to be supported by the new system
  - o Perform an overall SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) of current practices and processes.

- Infrastructure & Applications Architectures Review – We meet with the IT Department to discuss the existing infrastructure architecture, including network and servers, and applications architecture so that we can develop specifications that work within the existing environment. This is done in order to minimize the disruptive effect on the technical environment as well as minimize the technical support required by the new system.

- Integration Requirements – During both business practice/process and IT Department discussions, we examine the systems that are currently integrated to the system and look for opportunities to improve the efficiency of the environment by including them in the specifications for the replacement system.

- System Support Requirements – Assess the function and operations performed to support the current system based on interviews with the IT staff and end-user support staff, including:
  - o The ability of the application to support technical services, such as workflow changes
  - o Third party vendor interaction within the overall support structure
  - o User involvement, control and segregation of duties for configuration changes.

PHASE 1.2 – NEEDS ASSESSMENT AND PLAN OF ACTION

With the findings discovered in Phase 1.1, Sciens will then develop a Plan of Action.

- Needs Assessment and Action Plan – Sciens produces a comprehensive document at the conclusion of this phase, documenting the current state of the environment, the City's vision for the new system, infrastructure and application architectural requirements, integration requirements, system support requirements, and the initial budget and timeline for use in budget planning. In addition, Sciens develops a SWOT Analysis of the City's current business practices and processes, including recommendations for ones to be targeted for change with the new system.

- Initial Budget and Timeline Development – Based on Sciens' experience at acquiring and implementing CD systems, and using the requirements gathered during the Needs Assessment, we develop an initial budget for a replacement system that includes the required modules, interfaces, hardware and services. This data is presented in the form of a range of high and low-cost estimates. In addition, Sciens develops a preliminary timeline for implementation of the system.

- Status Meeting & Reporting – Throughout the phase, Sciens keeps the City's project manager informed regarding progress being made towards milestones, as well as alerting the project manager as to whether there are any obstacles towards meeting the City's timeline for selection of a new system. Project team discussions and updates can occur as frequently as needed via GoToMeeting, or in person as required by the City. Sciens recommends these meetings occur weekly throughout this phase, and on an ad hoc basis as needed. Minimally, formal presentations to the Project Team during this phase occur at the start of the project and with the delivery of the Action Plan.

Phase 1.2

Needs Assessment & Plan of Action

- Current System Limitations
- Key End User Functionality Needs
- Timeline Development
- Initial Budget
- Plan of Action Development

PHASE 1.3 – REQUESTS FOR PROPOSAL DEVELOPMENT

In Phase 1.3, we assist the City with the development of the Requests for Proposal and work with Purchasing to see them released to the marketplace.

Sciens develops detailed technical specifications utilizing the inputs from the Needs Assessment & Plan of Action phase. Once the specifications have been reviewed by the City, they are compiled with response documents into a request for proposal (RFP). The RFPs are then issued by the City to the Vendor marketplace. This phase includes:

- Software and Infrastructure Technical Specifications – Specifications are compiled using inputs from the interviews conducted in Phase 1.1. Specifications include software (functional) specifications grouped by major components of the systems which can include: Finance, Human Resources, Payroll, Planning & Development, Asset Management, Citizen Portal, Project Management, Time Entry, etc. In addition, infrastructure specifications (hardware and architecture) are created to describe the City's overall technical requirements (e.g., system architecture, network infrastructure, desired database and compatibility, servers and data storage, system backup and interfaces, security, scalability, reliability/stability, configuration flexibility, and centralized management).

    Once the City has the opportunity to review the specifications, Sciens will conduct conference calls via GoToMeeting with the reviewers to discuss any specifications that need to be deleted, reworded or added.

- Refine Estimated Budget & Timeline – Throughout the project, Sciens reexamines the estimated budget and timeline using available inputs. Within the context of this phase, this will be done as part of the Vendor Evaluation Matrix (below) development in order to provide the City with the most accurate estimate using the available vendors' inputs.

- RFP Development & Release – Once the specifications have been developed, an RFP narrative section is developed. This describes the City's current environment, the vision the City has for the new system, and specifically what the City is looking for. In addition to the RFP narrative, proposal response forms are developed. These forms are the only permissible mechanism for vendors to respond to the RFP; they are compiled using locked MS Word and Excel files that force vendors to respond systematically to ease overall evaluation, while permitting them to have freeform fields for explanation and comment. Once the City has had the opportunity to review the RFP document, Sciens will conduct conference calls via GoToMeeting with the Project Team to discuss any specifications that need to be deleted, reworded or added.

    The RFP narrative, software specifications and proposal response forms, along with language supplied by Purchasing for the City's acquisition requirements, constitute the RFP. This is compiled for submission by the City to bid services (e.g., Public Purchase) and/or direct submission to the top industry vendors.

- Selection Criteria and Weightings – As part of the RFP definition process, and prior to the release of the RFP to the marketplace, Sciens will work with the City to define the selection criteria and respective weightings for each of the major components of the vendors' responses. This will be done in full compliance with the City's Purchasing requirements, including any Cone of Silence requirements prohibiting communications with vendors during the selection process.

- Status Meeting & Reporting – Throughout the phase, Sciens keeps the City's project manager informed regarding progress being made towards milestones, as well as alerting the project manager as to whether there are any obstacles towards meeting the City's timeline for selection of a new system. Project team discussions and updates can occur as frequently as needed via GoToMeeting, or in person as required by the City. Sciens recommends these meetings occur weekly throughout this phase, and on an ad hoc basis as needed. Minimally, there will be discussions with each of the functional groups over their review of the specifications, and with the Project Team over the narrative, response forms, selection criteria and

weightings, and overall RFP document. Formal presentations to the Project Team outside of this Phase's process are kept to a minimum to reduce demands upon Project Team members which are already significant during this phase.

PHASE 1.4 – VENDOR EVALUATION AND SELECTION

In Phase 1.4, the Sciens team evaluates proposals submitted by the vendors, assist the City in selecting two vendors to be invited for demonstrations, assist the City with evaluation of the demonstrations, incorporate feedback from the City from reference checks and site visits, make a final recommendation on a vendor, and assist the City with contract and statement of work negotiations.

Sciens supports the City by proctoring the Bidders' Conference, analyzes the vendor proposal responses, and uses the Vendor Evaluation Matrix to record their performance and determine their conformity to the specifications. Sciens will also lead the City project team through their own evaluation of the proposals. Once the evaluation of all proposals is completed, Sciens works with the City to develop a shortlist of up to two vendors to be invited by the City to demonstrate their system to the City. Based upon performance against the RFP and demonstrations and incorporating feedback from the City from reference checks and site visits, Sciens works with the City project team to make a final recommendation of what vendor it should choose. Subsequently, we support the City through contact and statement of work negotiations.
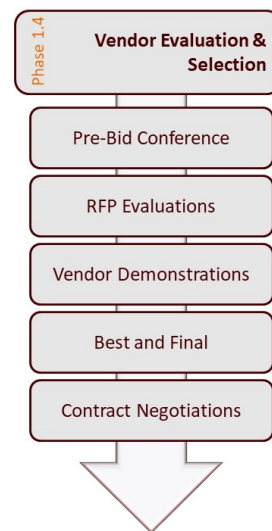
Specifically, this phase involves the following activities:

Bidders' Conference and Vendor Q&A Addendum – Shortly after the issuance of the RFPs, a Bidders' Conference is held by the City. Sciens proctors the bidder's conference. This can be either mandatory or option for the vendors based on the City's requirements; and, it can be conducted in person or via teleconference (e.g., GoToMeeting). At the conference, the City provides a summary of the RFPs and their intent; the City also provides an informal, non-binding response to questions submitted during the conference. Subsequent to the bidders' conference, a formal response to all questions submitted prior to and during the bidders' conference is drafted by Sciens and posted by the City as an addendum to the RFPs.

- Vendor Evaluation Matrix – Sciens develops the Vendor Evaluation Matrix, a spreadsheet that tracks each vendors' performance at each stage of the evaluation process. During Phase 1.4, we develop the vendor evaluation matrix, including weightings to be used for each component of the evaluation, to track performance by each vendor.

- 5-Year Cost Analysis – In addition to the Vendor Evaluation Matrix, Sciens will also develop a model to analyze the 5-year cost to the City of the various cost options for each vendor. This analysis will then be ranked and weighted to assign points to the total score.

- Vendor Proposal Evaluations – Utilizing the Vendor Evaluation Matrix developed earlier, Sciens analyzes each of the proposal submissions for compliance with both technical and business requirements. In addition, Sciens will assist the City project team through the evaluation of the proposals. Based upon this data, Sciens and the City project team rate the overall performance of each vendor, and the strengths and weaknesses based upon its proposal response.

- Vendor Shortlist Selection – Sciens will enter the City's evaluative data into the Vendor Evaluation Matrix, ranking the vendors based on their estimated ability to satisfy requirements. Based upon this ranking, Sciens works with the City to recommend for the City to consider inviting for demonstrations of their products and capabilities.

- <u>Vendor Demonstrations</u> – Sciens staff proctors and supports the City through vendor demonstrations sessions as per detailed below:
  - Phase 1.4: Permitting Software Demos – up to three (3) demo days (i.e., 3 vendor demos, 1 day each).
  - Phase 3.4: CD System Demos – up to six (6) demo days (i.e., 2 vendor demos, 3 days each).
  - Sciens provides the City's project team with a scoring tool to be used by City staff evaluating the vendor demonstrations. Sciens will also evaluate the Vendor's performance, if required by the City. Subsequently, we compile the results of the scoring tool to score each of the vendors and add this data to the Vendor Evaluation Matrix.
- <u>Contract and Statement of Work Negotiation Support</u> – Once a vendor has been chosen for contract negotiations, Sciens works with the City to review the vendor's documents, attend meetings and conference calls as needed, to finalize a contract, license and support agreements, and statement of work that the City finds acceptable. Sciens will provide up to 40 hours of contract and statement of work negotiation support for each Phase 1 & 3.
- <u>Status Meeting & Reporting</u> – This is the longest phase in terms of overall duration, and regular communications between the City and Sciens are critical. Throughout the phase, Sciens keeps the City's project manager informed regarding progress being made towards milestones, as well as alerting the project manager as to whether there are any obstacles towards meeting the City's timeline for selection of a new financial system. Project team discussions and updates can occur as frequently as needed via GoToMeeting, or in person as required by the City. Sciens recommends these meetings occur weekly throughout this phase, and on an ad hoc basis as needed.

PROJECT DELIVERABLES

Detailed below is a summary of the deliverables you can expect to receive throughout the duration of the project.

Phases 1.1 and 1.2:
- Project Plan and Timeline
- Kickoff Presentation
- End User and Management Survey
- Business Practices and Processes Review
- Review of Current Technical Environment and System Status
- Review of Current Functionality
- New System Vision
- Initial Budget and Timeline
- SWOT Analysis
- Needs Assessment and Plan of Action Report

Phase 1.3:
- Software and Hardware Technical Specifications
- Request for Proposal (i.e., narrative, finalized technical specifications, proposal response forms)
- Selection Criteria, Weightings and Decision-Making Process
- List of Representative Vendors in this space
- Updated Project Timeline GANTT and Budget
- Project Management & Status Reporting

Phase 1.4:
- Project Management & Status Reporting
- Vendor Pre-Bid Conference and Q&A Addendum
- Proposal Evaluation Matrix
- Vendors Proposals Evaluation
- Short List Recommendations
- Vendor Demonstration Proctoring & Evaluation
- Recommendation of Vendor Award
- Vendor Negotiations (i.e., Contract, License and Support Agreements, Statement of Work)

PROJECT TIMELINE

A draft GANTT chart for the project, identifying the major tasks with associated, proposed start and completion dates and milestones, is shown below. Sciens will work with the City of Keller to arrive at a schedule that meets your objectives and deadlines.

COMMUNITY DEVELOPMENT SYSTEM SELECTION PROJECT

ID	Task Name	Start	Finish	2022							
				Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
1	**1.1 Project Management, Data Gathering & Interviews**	**2/2/2022**	**2/22/2022**								
2	Initial Data Gathering and Documentation	2/2/2022	2/15/2022								
3	Department Interviews	2/16/2022	2/22/2022								
4	**1.2 Needs Assessment & Plan of Action**	**2/23/2022**	**3/22/2022**								
5	Needs Assessment Development	2/23/2022	3/22/2022								
6	**1.3 RFP Development**	**3/23/2022**	**5/3/2022**								
7	Technical Specifications Development	3/23/2022	4/12/2022								
8	RFP Development	4/13/2022	5/3/2022								
9	**1.4 Vendor Evaluation & Selection**	**5/4/2022**	**8/23/2022**								
10	Vendor Proposal Development	5/4/2022	6/6/2022								
11	Bidders Conference, Q&A Addendum, Vendor Evaluation Matrix, Proposals Evaluation	6/7/2022	6/16/2022								
12	Short List Notification & Vendor Preparation for Demonstrations	6/17/2022	6/28/2022								
13	Vendor Demonstrations	6/29/2022	7/19/2022								
14	Contract Negotiations	7/20/2022	8/23/2022								

SECTION 4: CLIENT REFERENCES

While all of our clients are referenceable, we have highlighted four (4) clients who selected Sciens to support their software selections. These projects have all occurred within the last three years. Stephen Gousie, Ernest Pages and Steven Barcey, all of whom would be assigned to the City's project, were engaged in these projects, as well as many others all over the country.

TOWN OF PROSPER, TEXAS

Project Information	Details
Name of Organization	Town of Prosper, Texas
Address	1100 Bear Creek Parkway Keller TX 76248
Contact Information	Pamela Clark, Project Manager Email: pclark@prospertx.gov Phone: (972) 569-1091
Projects	• Community Development Risk Analysis, Assessment, RFP and Selection • Community Development Implementation Support

CITY OF NORTH RICHLAND HILLS, TEXAS

Project Information	Details
Name of Organization	City of North Richland Hills, Texas
Address	4301 City Point Drive North Richland Hills, TX 76180
Contact Information	Karen Bostic, Assistant City Manager Email: kbostic@nrhtx.com Phone: (817) 427-6005 Mark Mills, Finance Director Email: mmills@nrhtx.com Phone: (817) 427-6167
Projects	• ERP & Community Development Risk Analysis, Assessment, RFP and Selection • ERP & Community Development Implementation Support • Public Safety System Risk Analysis, Assessment, Planning, Selection, and Implementation

CITY OF NORMAN, OKLAHOMA

Project Information	Details
Name of Organization	City of Norman, Oklahoma
Address	201 W Gray Street Norman, OK 73069
Contact Information	Kari Madden, Applications Manager Email: Kari.madden@normanok.gov Phone: (405) 226-0023
Projects	• Currently assisting with implementation of replacement for their SunGard HTE system for Finance, Human Resources/Payroll, Community Development, Utility Billing, Asset Management.

CITY OF RICHARDSON, TEXAS

Project Information	Details
Name of Organization	City of Richardson, Texas
Address	411 W. Arapaho Road Richardson, TX 75080
Contact Information	Dan Steege, Chief Information Officer Email: Dan.steege@cor.gov Phone: (972) 744-4041
Projects	• City-Wide Applications Strategy Plan • Community Development/ERP Risk Analysis, Assessment, Planning and Selection • Strategic IT Master Plan

SECTION 5: FEE SCHEDULE

PROJECT COST DETAIL

The total project professional fees for services on the City of Keller Enterprise Resource Planning System Solution Selection project are represented in the Project Cost Detail. Based on the scope of work description, deliverables, and our proposed method for conducting the services outlined below, our not-to-exceed-total cost to complete all tasks is outlined below. Since Sciens is a local firm in the Dallas-Fort Worth area, no travel expenses will be charged.

COMMUNITY DEVELOPMENT SYSTEM SELECTION PROJECT

Phase	Activity	Hours	Fees	Expenses	Total
1.1	**Project Management, Data Gathering & Interviews**				
A	Data Gathering and Onsite Interviews	44	$ 9,200	$ -	$ 9,200
1.2	**Needs Assessment & Plan of Action**				
A	Plan of Action Development	68	$ 11,600	$ -	$ 11,600
1.3	**Requests for Proposal Development**				
A	RFP Development and Review	96	$ 16,800	$ -	$ 16,800
1.4	**Vendor Evaluation & Selection**				
A	Bidders Conference, Q&A Addendum, Vendor Evaluation Matrix, Proposals Evaluation	44	$ 7,400	$ -	$ 7,400
B	Short List Demos	48	$ 12,000	$ -	$ 12,000
C	Final Recommendations	8	$ 2,000	$ -	$ 2,000
D	Contract & SOW Negotiation Support	40	$ 10,000	$ -	$ 10,000
Total Cost		**348**	**$ 69,000**	**$ -**	**$ 69,000**

EXHIBIT C

ACORD® CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
05/18/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	Nancy Munoz	
Brown & Brown of Florida, Inc.	PHONE (A/C, No, Ext): (305) 714-4400		FAX (A/C, No): (305) 714-4401
14900 NW 79 Court Suite 200	E-MAIL ADDRESS: nmunoz@bbinsfl.com		

		INSURER(S) AFFORDING COVERAGE	NAIC #
Miami Lakes	FL 33016	**INSURER A :** Hartford Fire Insurance Company	19682
INSURED		**INSURER B :** Twin City Fire Insurance Company	29459
Sciens, LLC		**INSURER C :** Philadelphia Indemnity Insurance Company	18058
5900 South Lake Forest Drive, Suite 300		**INSURER D :**	
		INSURER E :	
McKinney TX 75070		**INSURER F :**	

COVERAGES   CERTIFICATE NUMBER: 2021 Master   REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR			21SBABW5052	07/01/2021	07/01/2022	EACH OCCURRENCE	$ 2,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 300,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☒ PROJECT ☐ LOC OTHER:						GENERAL AGGREGATE	$ 4,000,000
							PRODUCTS - COMP/OP AGG	$ 4,000,000
							Employment Practices	$ 100,000
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			21SBABW5052	07/01/2021	07/01/2022	COMBINED SINGLE LIMIT (Ea accident)	$ 2,000,000
							BODILY INJURY (Per person)	$
							BODILY INJURY (Per accident)	$
							PROPERTY DAMAGE (Per accident)	$
								$
A	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☒ RETENTION $ 10,000			21SBABW5052	07/01/2021	07/01/2022	EACH OCCURRENCE	$ 2,000,000
							AGGREGATE	$ 2,000,000
								$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N: N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	21WBCAJ4746	01/01/2022	01/01/2023	☐ PER STATUTE ☒ OTHER	
							E.L. EACH ACCIDENT	$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	$ 1,000,000
C	Professional Liability			PHSD1674818	01/01/2022	01/01/2023	General Aggregate	5,000,000
							Each Occurence	2,000,000
							Deductible:2,500	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION
City of Keller 330 Rufe Snow Drive Keller TX 76248	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE

ACORD 25 (2016/03)   The ACORD name and logo are registered marks of ACORD

ADDITIONAL COVERAGES

Ref #	Description				Coverage Code	Form No.	Edition Date
	Hired Physical Damage						
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
50,000			500				

Ref #	Description				Coverage Code	Form No.	Edition Date
	Hired & Non-Owned Auto Liability						
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
2,000,000							

Ref #	Description				Coverage Code	Form No.	Edition Date
	Employer's liability				EL		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		

Ref #	Description				Coverage Code	Form No.	Edition Date
	Loss constant				LCNT		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
					$1.00		

Ref #	Description				Coverage Code	Form No.	Edition Date
	Expense constant				EXCNT		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
					$250.00		

Ref #	Description				Coverage Code	Form No.	Edition Date
	Experience Mod Factor 1				EXP01		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
					-$133.00		

Ref #	Description				Coverage Code	Form No.	Edition Date
	Premium discount				PDIS		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
					-$15.00		

Ref #	Description				Coverage Code	Form No.	Edition Date
	State surcharge 1				STSR1		
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		
					$27.00		

Ref #	Description				Coverage Code	Form No.	Edition Date
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		

Ref #	Description				Coverage Code	Form No.	Edition Date
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		

Ref #	Description				Coverage Code	Form No.	Edition Date
Limit 1	**Limit 2**	**Limit 3**	**Deductible Amount**	**Deductible Type**	**Premium**		

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