

Amilia Professional Services: Statement of Work

Project Summary:

The City of Redmond intends to implement the SmartRec platform to replace its ActiveNet software.

SmartRec is a highly configurable product, and as such it is expected that the results of operations that can reasonably be deemed to be core to the needs of City's Parks and Recreation Department will be able to be replicated by the software. The processes City staff will follow will be determined by the Core User Group in partnership with Amilia staff.

In this context, Amilia will ensure there is a process that City staff can follow to complete their tasks. It is important to note that SmartRec is not the same product as ActiveNet and the process will more than likely be different.

Should any part of the onboarding process uncover a software deficiency that does not allow for a configuration needed by the city, Amilia will use all commercially reasonable methods to resolve this deficiency.

Scope:

- Business Process Assessment (up to 8 hours of business assessment workshops)
- Configuring planning & consulting throughout the project (up to 12 hours of consulting calls)
- Training for staff
 - Full access to the Amilia University – no limit on the number of staff who have access.
 - Up to 16 hours of training webinars with your implementation consultant.
 - Webinar recordings will be shared with the City.
- Launch Readiness Support: Testing and ensuring correct set ups.
- Project Management (for the duration of the project)
 - Assigned project manager.
 - Weekly status calls (60-min).
 - Meeting agendas, minutes, action item reports.
 - Detailed project Gantt chart.
- Change Management Workshop
 - ½ day change management workshop for the leadership team.
- Services of an API consultant to guide City staff through the design of any required integrations, and the discovery of our API endpoints and webhooks. All meetings can be recorded and the recordings shared upon request.
- Access to all API/Web Hooks.

- Adding of an inquiry/payment of an invoice to the API/Web Hook catalogue free of charge and if necessary.

Out of Scope:

- Custom feature development*
- Data Migration is possible but not included in the quoted fees (consult pricing matrix included with this document and the license agreement)
- Integrations with a 3rd party via the API/Web Hook infrastructure (City is responsible for integrations with any 3rd party applications)

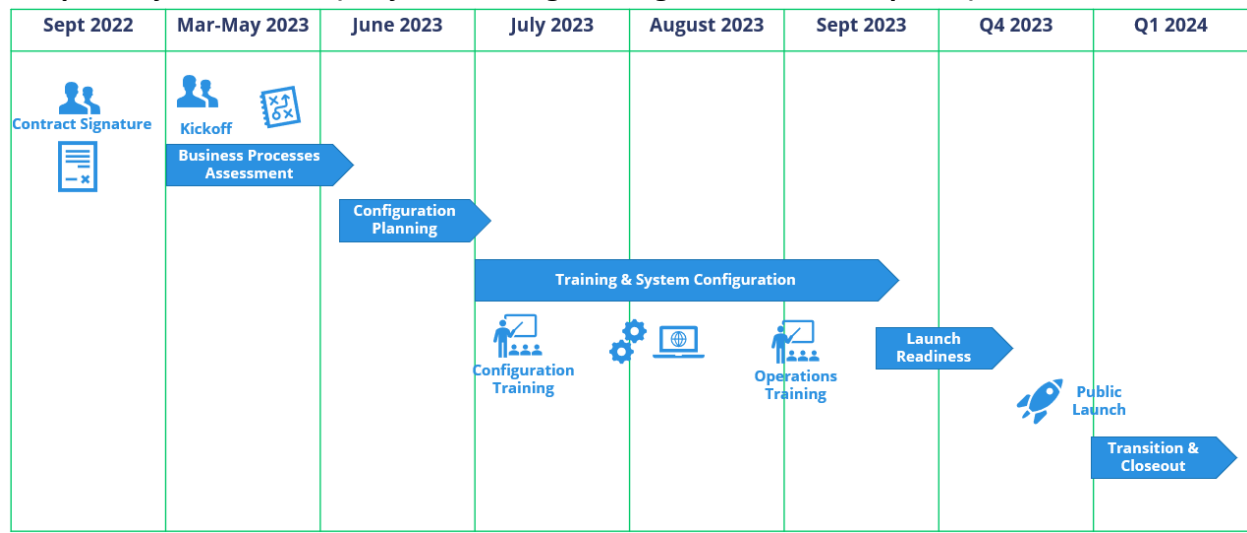
*Custom feature is defined as a feature that does not exist in the platform

Client Responsibilities:

- The City is responsible to identify a project champion(s) to coordinate internally to ensure all **City** stakeholders are involved in the right sections.
- The City is responsible to identify a Core User group who will be extensively trained and make configuration decisions on behalf of the city.

Professional Services: Timeline & Milestones

Sample Project Timeline (subject to change during the assessment phase):



Milestone 1 – Project Kick Off (March 2023)

Introduction of the teams involved in the implementation.

Deliverables - Completion of:

1. Introductory Call
2. Project Kick Off Call

Milestone 2 – Business Processes Assessment (March-May 2023)

In order to gain a full, in-depth understanding of the City's operations and detailed processes, the Amilia team will facilitate a business process assessment workshop with key stakeholders (as determined by the City). The deliverables of this workshop are to map out and document for the purposes of planning training:

- The City resident journey.
- Business rules and processes used to conduct daily operations.
- Current state and planning for future state of City processes.

Additionally, an important component of the Business Assessment is to build a working relationship with the team members who will participate in the implementation to set us up for success.

The workshop consists of up to eight (8) hours of sessions with relevant stakeholder groups (e.g. rentals, aquatics, memberships, senior programming).

Deliverables - completion of mapping out and documentation of:

1. The City of Redmond resident journey.
2. Business rules and processes used to conduct daily operations.
3. Current state and planning for future state of City processes.

Milestone 3 – Configuration Planning (June 2023) & Project Consulting (throughout the project)

Upon completion of the business process assessment workshop, the Amilia implementation team works with the City Core User group to plan the configuration of the software. Key deliverables at this stage include selecting the modules that will be used within the software, preparing the program hierarchy, outlining the facilities hierarchy, creating user permission groups, and supporting the City in creating documentation outlining the system configuration. The key deliverables from this stage require close collaboration between the core user group and the Amilia implementation team.

At this stage, we also assign stakeholders who will be responsible for the configuration of every aspect of the software. This list of people helps preparing the training and configuration phase, including how to structure the agenda to best suit the City's needs.

Deliverables -

1. Plan the configuration of the software.
2. Select modules to be used.

- a. Note: the City can add/remove modules at any time without informing Amilia.
3. Determine programming and facility hierarchy.
4. Determine user permission groups.

Milestone 4 – Virtual Instructor-led Training & System Configuration (July-September 2023)

During this phase, the Implementation Consultant will deliver live, web-based sessions. The content of these training sessions will be customized to the needs of the City based on the outputs of the business assessment and feedback from the core user group. The Implementation Consultant will work with the users to set up scheduled sessions and identify areas of training to be covered. These training sessions are interactive, and participants are encouraged to follow along in the system, as well as ask questions throughout. Each session is recorded and provided to the attendees so that they can review at their leisure. We recommend that the training include core users as well as recreation managers and supervisors who will be responsible for managing the software, entering programs and memberships, etc. Typically, users that only perform client operations (front desk staff) do not need the full training and we recommend that City staff who participated in the full training in turn train their front desk staff. Amilia can support this by providing content and guidance.

Deliverables –

1. Advanced training for the Core User group.
2. Documentation of configuration processes and unique and/or City of Redmond specific system configurations and recommendations that are not easily replicated via the help center.
3. Training and configuration of all required modules.
4. Training and POS fully set up.
5. All shelters available for public rental set up.
6. Live Segments (ArcGIS integration) to be set up and configured by City staff (with the support of the Amilia team).
7. Recreation centers ready for participants and check-in capabilities.
8. City staff to add all programming information added to the system.
9. Access to API consultant to guide City staff through the design of any required integrations.
10. Services of API consultant in the discovery of SmartRec API endpoints and webhooks.
11. Access to all API/Web Hook infrastructure and documentation.

Milestone 5 – Launch Readiness: Data migration (Q4 2023)

Mass data migration is not recommended. As most data becomes outdated quickly, it is usually best practice to start new as residents create their accounts. This helps ensure your CRM is up to date and information is accurate. Utilizing change management support, we recommend inviting residents to set up their account, and even create an “enter to win” concept to build the database more quickly.

Although we look for opportunities to populate the database organically, there are scenarios where the best solution is to import critical data – examples include but are not limited to - account balances, bookings that extend past a go live date, account credits, active memberships. We will determine together the best strategy for the City’s data cutover.

If required, data migration is charged on a per job basis according to the chart below:

Volume of data & Complexity	Under 1,000 lines	1,000-5,000 lines	5,000-10,000 lines	10,000+ lines
Simple – Clients Only (Adult Account Owners Only) (Names, Addresses, Phones, Email, DOB, Admin notes, Balance)	\$500	\$1000	\$1500	\$2500
Medium – Families (Multiple people within the same account) (Names, Addresses, Phones, Email, DOB, Admin notes, Balance)	\$1000	\$1500	\$2500	Custom Quote
Complex – Clients with purchases (Memberships, Activities, Multipasses, Skills) One purchased item per person	\$2000	\$3000	Custom Quote	Custom Quote
Complex – Clients with multiple purchases (Memberships, Activities, Multipasses, Skills) Multiple purchased items per person	Custom Quote Starting at \$3000			

Deliverables:

1. Data migration of current information (if purchased).
2. City staff enter all reservation/permit/contract information into the system that happens past go-live date (if required).

Milestone 6 – Launch Readiness: Testing (Q4 2023)

The Amilia team will support City stakeholders in testing key processes and configurations documented in the configuration planning phase.

Deliverables – Testing of:

1. POS & accompanying hardware set up at all locations.
2. Facility configurations to confirm public rental set up is ready for live reservations/payments.
3. Recreation center configurations to confirm participants and check-in capabilities.
4. Programming configurations to confirm system and is ready for participants to sign up and pay.

5. Any integrations that are being leveraged.

Milestone 7 – Launch (Q1 2024)

The Amilia team will support City stakeholders virtually during soft and formal launch.

Milestone 8 – Transition & Closeout (Q1 2024)

The Amilia team will support City stakeholders in their transition to the Customer Success and Support teams.

Professional Services: Billing

All services billed in 2 parts upon completion of Milestone 1 and 6.