Date: 07/31/2019

To: Tom Sullivan, Dan Weinheimer, and BCC

From: Todd Carr, Building Official

Subject Property: City View Project Team Selection

- **Executive Sponsor:** Tom Sullivan
- **Steering Committee:** BCC / Dan Weinheimer / Julie Kennedy / Accounting Department
- **Project Manager:** Todd Carr
- **Subject Matter Experts (SMEs):** All Staff within each Department that utilizes the software to perform work related services and daily responsibilities. Also Staff within our IT/GIS Departments, and all County Staff that may utilize the data within the software for regular reporting purposes or special projects. Our External Users "Public" that interface with the software on a daily basis.
- **Data Conversion Expert:**
  Jim Payne
  Mary Schutte from City of Steamboat Springs
- **Technical Analysts/Experts:**
  Building Department: Malea Michael-Ferrier and Todd Carr
  IT Department: Jim Payne and Robert Felinczak
  GIS Department: Emy Keeling
  Planning Department: Alan Goldich and Chad Phillips
  Environmental Health Department: Scott Cowman and Gina Cadrecha
  Public Works Department: Geovanny Romero
- **Database Administrator:** Jim Payne and Emy Keeling for Addressing
- **Systems and Network Administrators:** County IT in combination with City View who provides the Cloud Based Environment
- **Testers (often the same people as the SMEs):** All Staff within each Department that utilizes the software to perform work related services and daily responsibilities. Also Staff within our IT/GIS Departments, and all County Staff that may utilize the data within the software for regular reporting purposes or special projects. Our External Users "Public" that interface with the software on a daily basis.

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- **Application Administrators**
  Building Department: Malea Michael-Ferrier and Todd Carr
  IT Department: Jim Payne and Robert Felinczak
  GIS Department: Emy Keeling
  Planning Department: Alan Goldich and Chad Phillips
  Environmental Health Department: Scott Cowman and Gina Cadrecha
  Public Works Department: Geovanny Romero

- **Trainers:** City View will provide initial training to all staff who have purchased a User License. All Department Managers are then responsible from that point forward to train their own staff internally if they add User Licenses, Promote new responsibilities to existing staff, or hire new staff. City View will offer annual conferences and training sessions, however each Department Manager would be responsible to plan in advance through Budgeting to provide or attend such training, which could occur for several different reasons with the most likely reason being a newer version or new module being purchased or upgrades.
- **End Users:** All Staff within each Department that utilizes the software to perform work related services and daily responsibilities. Also Staff within our IT/GIS Departments, and all County Staff that may utilize the data within the software for regular reporting purposes or special projects. Our External Users "Public" that interface with the software on a daily basis.

Change Order Requests: All Department Managers or Staff on the Core Team for this project will be responsible to complete their own Change Order Request Forms throughout this project if necessary due to complications throughout the implementation process, or items are found to be missed compared to the Functional Requirements you listed in your Departments RFP Appendixes.

Proper Procedures for Change Order Requests

1. Department Manager must fill out the Change Order Request Form.

2. Then provide a copy of the Change Order Request Form to the County Project Manager.

3. Project Manager will provide a copy of the Change Order Request Form to City View in order for City View to provide back an Estimated Cost for the Change Order Request Form. Project Manager will then provide the Department Manager with the completed Change Order Request Form to review.

4. Department Manager must include a separate letter explaining how costs will be covered within their Departments Budget, or explain if necessary if a Supplemental Budget Request will be needed.

5. County Project Manager will then provide the County Executive Sponsor and County Steering Committee with the Completed Change Order Request Form to review and approve prior to this Change Order being implemented.

6. County Project Manager will then update the Cost Sharing Excel Sheet to include the Change Order Cost and associate the cost to the proper Department, and if needed due to the type of Change Order being requested change other Line Items accordingly.

7. County Project Manager and Department Manager will be responsible to then provide our Accounting Department the updated Total Project Cost, a copy of the Change Order, and an updated Cost Sharing Excel Sheet for the project.

Reporting to the CityView Project Manager, the Developers will be responsible for the development of any assigned custom reports or customization requirements. Below is a list of responsibilities to be performed by the Developers:

1. Create in-scope custom reports and unit test them
2. Create in-scope customizations and unit test them
3. Create in-scope interfaces and unit test them
4. Provide customizations and interfaces to the QA Team for unit testing
5. Periodically review the ISs configuration for adherence to best practices and efficiencies and provide guidance and oversight where necessary

Quality Assurance Team

Responsible for testing the quality of your CityView solution and any customizations and interfaces. They use a combination of automated and manual testing on your environment. Bug Tracker Tools, Unit Testing, and Manual Test Cases are used in a strategic test plan that results in a stable, error free application for delivery. Responsibilities include:

- Maintain QA environments on the same version as the County's Development Environment for parallel testing and troubleshooting
- Log test results, log issues in detail and provide issues logs to Application Development team
- Provide unit testing as detailed within roles above
- Provide advice on timing and readiness of version releases.

We envisage the **County's project team** is comprised of:

- ➢ **Executive Sponsor**
- ➢ **Steering Committee**
- ➢ **Project Manager,**
- ➢ **Subject Matter Experts (SMEs),**
- ➢ **Data Conversion Expert,**
- ➢ **Technical Analysts/Experts,**
- ➢ **Database Administrator,**
- ➢ **Systems and Network Administrators,**
- ➢ **Testers (often the same people as the SMEs),**
- ➢ **Application Administrators**
- ➢ **Trainers**
- ➢ **End Users**

County Executive Sponsor

The Executive Sponsor provides the vision of the project in alignment with the County's corporate short term and long term goals and objectives. The Executive Sponsor's responsibilities include:

- Participate on the project Steering Committee
- Promote the project throughout the County
- Monitor the progress of the project
- Monitor the overall County impact
- Empower the County Project Manager and the core project team to make decisions
- Make timely decisions
- Maintain the authority to set priorities, approve overall scope and settle issues / priorities that significantly affect the project and the County
- Support the Project Managers in accomplishing the project goals
- Provide a vision of the County's goals
- Maintain an active relationship with CityView Management

County Steering Committee

Should the County wish to form a Steering Committee for the project (internal to the County), the Steering committee typically develops the vision for the project in alignment with the County's short term and long term goals and objectives. The Steering committee is suggested to be composed of the County Project Sponsor(s), the County's Executive Sponsor and the County's Business Leads. The Steering committee has the following responsibilities:

- Attend Steering Committee meetings
- Set priorities
- Approve scope and scope changes
- Resolve escalated issues
- Provide strategic guidance to achieve the define project goals
- Promote the project throughout the County
- Commit the required resources to the project and approve new ones when required
- Monitor the project progress
- Monitor the overall County impact
- Approve extensions to project timeline or addition of new County resources to resolve County -side delays
- Empower the County Project Manager and the core project team to make decisions
- Generate timely decisions
- Conduct periodic review of project progress
- Make strategic decisions to manage business and project risks
- Support both Project Managers to accomplish project goals
- Have an active relationship with CityView management

County Project Manager

The County Project Manager is responsible for the overall County deliverables and the day-to-day management of the project. This resource is the primary liaison between the CityView Team, the County's project team and the Steering Committee. Both Project Managers will work together to meet the objectives, address issues, facilitate resolution and participate in active management of the teams. Below is a list of responsibilities to be performed by the County's Project Manager:

- Manage all County resources for project related activities
- Manage the project (budget, timeline, quality, risks, scope, issues, deliverables, etc.) in cooperation with CityView's Project Manager
- Communicate project status to the Steering Committee, the Executive Sponsor and the project team leveraging updates from CityView's status updates
- Participate in the Steering Committee meetings
- Create, maintain, manage and refine the project schedule with all its elements in cooperation with the CityView Project Manager
- Maintain project standards especially Scope & Status reporting
- Prepare, organize and co-conduct with the project kick-off meetings
- Manage the delivery and coordination of County project tasks
- Manage all project deliverables in coordination with CityView's Project Manager
- Manage and streamline the issue management process in conjunction with CityView Project Manager
- Manage project deviations and take necessary corrective actions
- Participate in gathering of the County's business process requirements when required
- Plan, manage and execute the Acceptance Test efforts
- Plan, manage and execute the end user training efforts
- Provide timely reviews and potential sign-offs on all project deliverables approval documents as presented by the CityView Project Manager
- Review and accept project milestones
- Manage the logistical activities of the end user training
    - Training facilities
    - Students booking
    - Scheduling of sessions
    - Monitoring and logging the end user attendance
- Capture the end user feedback
- Responsible for internal & project communication
- Provide guidance to project team members
- Lead the Go-Live preparation planning
- Participate heavily in the Go-Live preparation tests
- Must provide Go / No Go Decision throughout the project phases
- Must be present for Go-Live

County Subject Matter Experts

The Business Experts own the business process within their functional areas since they perform these day-to-day business processes. These people collectively form the knowledge base of the County's business process requirements. Such resources will be involved in the Data Collection, as well as approval of the Scope Documentation and testing and acceptance of the configured system. They will further verify that the new configured system meets the County's business requirements as outlined in the Scope Documentation. They

will participate in making decisions regarding the business processes and they will help both Project Managers manage the project scope and all the associated deliverables. Below is a list of responsibilities to be performed by the SMEs

- Attend data collection & validation training sessions
- Participate in appropriate project team meetings
- Work with the CityView IS to provide input into the analysis of the business requirements and review the Scope Documentation
- Work with the CityView IS to validate the configuration through validation testing
- Develop appropriate validation test cases based on business scenarios
- Assist the County's Data Conversion Expert in data conversion validation & acceptance
- Assist in the development of user procedures
- Assist the project team in defining user access levels and privileges
- Assist the project team in the Go-Live support planning
- Provide end user post implementation Go-Live support where applicable
- Assist the County's Project Manager in problem resolution
- Support End User Training and documentation preparation
- Must be present for Go-Live

County Data Conversion Expert

The Data Conversion Expert will be involved with the CityView Data Conversion Specialist in analyzing, mapping, loading and testing the different cuts of data conversion. This resource must possess a strong knowledge of the existing data sources that will be converted from both the user and database ends of the existing systems that need to be converted. This resource will also learn about the database structure and the integrated tables (from data mapping documents provided by CityView) as this knowledge will help them relate to their existing data sources. This resource will also review and finalize the data mapping documents and will test the data once the preliminary cut is completed by CityView. Below is a list of responsibilities to be performed by the County's Data Conversion Expert:

- Act as the primary contact for CityView Data Conversion Specialist
- Acquire knowledge from the CityView Data Conversion Specialist as analysis & mapping is performed
- Understand the database structure through knowledge transfer and documentation provided by CityView
- Provide file layouts, where available, for existing data sources
- Provide data sources in an agreed to format
- During the analysis, provide documentation pertaining to the current systems (existing user manuals, etc.) if available
- Lead the analysis of the existing data sources as they relate to the database
- Finalize and approve the data mapping documents once prepared and delivered by the CityView Data Conversion Specialist
- Test and potentially accept the preliminary data conversion cut and any other subsequent data conversion cuts whether performed by CityView or the County's resources
- In coordination with the Database Administrator, prepare any other database environments that might be required for data cuts

- In coordination with the Database Administrator, prepare the production database for the final cut data load
- Work in conjunction with CityView to identify and possibly resolve conversion issues by directly communicating them to the project team, CityView, users and management
- Participate in the Go-Live preparation planning
- Should be present for Go-Live

City Technical and Advanced (Power) Users

These resources are involved with the CityView resources to learn the report writing tool and system configuration. They *could* assist in these two functions once knowledge transfer is accomplished. Once trained they will have access to the tools to support the end users with any future configuration enhancements to the system. These resources could also work in conjunction with CityView to lead the interfaces (third party integrations) **analysis, definition and acceptance** testing. Below is a list of responsibilities to be performed by the City's Technical Experts:

- Attend required Advanced training sessions (Configuration, Reporter Training)
- Acquire the necessary knowledge from the CityView resources through training sessions and documentation
- Participate in the analysis, design and acceptance testing of all interfaces to 3rd party systems (potentially)
- Should be present for Go-Live
- Other responsibilities depending on the degree of participation encouraged by the County

City Systems & Network Administrators

These resources will be required to provide assistance to the project team on an as needed basis. Below is a list of responsibilities to be performed by the County's Systems & Network Administrators:

1. Prepare servers for initial software setup and configuration
2. Provide setup of servers and provide network connectivity
3. Setup required peripherals for the different environments
4. Provide setup of clients' workstations if required
5. Setup testing environments as requested by the City's Project Manager
6. Participate in Go-Live preparation tests
7. Should be present for Go-Live

County End Users

These resources will be trained on the proposed products. Below is a list of responsibilities to be performed by the County's End Users:

1. Attend and actively participate in the appropriate training sessions provided by CityView
2. Understand existing business processes as well as the project scope at a reasonable level of detail
3. Have good Windows navigation skills

Sample Change Order Document

CHANGE ORDER DESCRIPTION			
Request Date:		**Change #:**	
Client / Project:			
Requestor:		**Created By**	
Description of the Requested Change:			
List of attached documents:			
Impact Assessment: Estimated impact to budget, work effort and schedule			
Total Estimated Cost:		**Planned Delivery Date:**	
Payment Terms:			

CHANGE ORDER APPROVAL			
Comments By:		**Date:**	
Comments:			
	Print Name	**Signature**	**Date**
Client PM:			
Client Executive:			
CityView PM:			
CityView Executive:			

XI. Issues & Problem Resolution

An issue refers to any matter that requires someone to make a decision, and about which no agreement has been reached or can be routinely reached. Typically, issues impede project progress until they are resolved. Change Control items may become issues if they're not dealt with quickly, but Change Control items are specific to the process of authorizing design changes that impact scope, schedule or budget whereas issues can be related to anything about the project that needs to be decided.

The CityView Project Manager will maintain an issue log and will assign responsibility for the resolution of project issues and reports progress to County's Project Manager and the CityView Project Team. Any Project Manager or team member can submit an issue for logging and resolution. Most project issues are expected to be resolved within the overall Project Team. If the issues are not resolved to the satisfaction of the Project Team, they may need to be escalated to the Project Executive Sponsor or appropriate level.

Typical project situations requiring escalation include conflicting resource demands threatening project staffing, group dependencies not being met, scope disagreements and issues with functionality of the project's deliverables nearing release time.

XI.1 Escalation Process:

CityView escalation levels in the order listed below:

1. Project Manager
2. VP, Professional Services
3. VP, Business Operations

County escalation levels in the order listed below:

1. Project Manager
2. Steering Committee
3. Executive Sponsor