

# e-Builder Task Order Form City of Pompano Beach

August 5, 2019

GSA Contract Number: GS-35F-408AA

Period Covered by Contract: May 31, 2013-May 30, 2023

General Services Administration

This Investment Summary is considered valid for 90 days from the above publication date of this Order Form. Non-approval of the Task Order within this timeframe will result in the redefinition of the Investment Summary.



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Sunrise, Florida 33323 | 800-580-9322

THIS TASK ORDER FORM (the "Task Order Form"), is between e-Builder, Inc. ("e-Builder") and City of Pompano Beach ("Customer"). This Task Order incorporates the executed GSA Service Agreement from GSA Contract Number GS-35F-408AA ("GSA Contract"). In the event of an inconsistency between the terms of this Task Order and the Service Agreement, the terms of the Service Agreement shall control.

The Effective Date of this Task Order shall be the last signature date found in the Service Agreement on page 3. The Initial Term of this Task Order Form (and Annual Software Subscription)-shall commence on the Effective Date and expire on the twelve-month (12) anniversary thereof. This Task Order Form can automatically renew for additional one (1) year terms (i.e., a "Renewal Term"), e-Builder or Customer shall provide written notice of non-renewal at least sixty (60) days prior to expiration of the then-current term. For each renewal after expiration of the Initial Term, e-Builder has a right to increase license fees up to the current GSA rates.

#### **Disclosure Statement**

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The information provided in this document shall not be disclosed outside the recipient's organization and shall not be disclosed in whole or in part for any purpose other than to evaluate the information. During the evaluation process, the recipient may duplicate this document only for distribution to evaluators within the recipient's organization. If a contract is awarded to e-Builder as a result of or in connection with the submission of this information, the recipient shall have the right to duplicate, use or disclose the information to the extent provided in the contract. This restriction does not limit the right of the recipient to use information contained if it is obtained from another source without restriction.

In the event that the recipient is served with a request to disclose any or all of e-Builder's confidential information pursuant to the requirements of applicable law, a judicial or governmental request, requirement or order or otherwise, e-Builder asks to be promptly notified in order to provide sufficient time to object to such request, understanding that the recipient will take reasonable steps to cooperate with and assist e-Builder in contesting such request, requirement, or order or in otherwise protecting e-Builder's rights prior to disclosure.

E-BUILDER, INC.

CITY OF POMPANO BEACH

By: Jeanne Prayther

By: \_\_\_\_\_

Title: CFO

Title: \_\_\_\_\_

Date: 10/31/19

Date: \_\_\_\_\_





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## Investment Summary

The following details the investment summary for the **Annual Software Subscription** and the **One-Time Implementation Services** for the e-Builder Enterprise™ system. This Task Order Form ties with e-Builder's Worldwide Federal Supply Schedule Contract, GS-35F-408AA.

### Annual Software Subscription

SIN	Part Number	Product Description	UOI	Annual Price
132-52	eB-Ent-Gov-20M-Capital_Program (on AWS GovCloud)	e-Builder Enterprise Government Edition hosted on AWS GovCloud (ITAR & FedRAMP compliant) which includes core platform and unlimited users for capital programs up to \$20 million USD. One-year subscription license with auto renewal.  Includes e-Builder Enterprise 20M Capital Program, AWS GovCloud Hosting, Business Intelligence Add-on, Sandbox, oData API, and BIM.	Platform with unlimited users for up to \$20 million in capital program	\$ 56,337.97
Total Annual Software Subscription				\$56,337.97

### One-Time Implementation Services

Item	Scope Variable	Hours	Price
e-Builder Enterprise Implementation, Setup, Deployment & Training	Per <i>Implementation Services Scope</i> section below	715	\$122,826.06
Total One-Time Implementation Services		715	\$122,826.06

### Labor Proposal GSA Detail

SIN	Labor Category	Rate	Hours	Price
132-51	Project Manager II	\$186.20	134	\$24,950.80
132-51	Business Analyst	\$168.46	581	\$97,875.26
GSA Implementation Proposal				\$122,826.06

## Total e-Builder Enterprise Investment – Initial Term

Item	Price
Total Annual Software Subscription	\$56,337.97
Total One-Time Implementation Services	\$122,826.06
<b>Total Initial Term Investment</b>	<b>\$179,164.03</b>

### Annual Subscription Includes

- Unlimited Projects
- Unlimited Document Storage
- 24x7 Technical Support
- Quarterly Enhancement/Upgrades
- Maintenance Releases
- Business Intelligence (BI) Maintenance Fee *(If Applicable\*)*
- oData Maintenance Fee *(If Applicable\*)*
- Sandbox Maintenance Fee *(If Applicable\*)*
- BIM Maintenance Fee *(If Applicable\*)*

\*Customer is purchasing the e-Builder Enterprise Government Edition. The Government edition includes subscriptions to Business Intelligence, oData, Sandbox, and BIM. These product add-ons are not considered active as their activation, configuration, and training are not in scope. If activation of one of these product add-ons is desired, Customer agrees to pay for activation under a separate addendum to this Task Order Form.

### Implementation Services Scope

Phase & Deliverables	Scope	Comments
<b>Project Kickoff &amp; Discovery</b>		
Kick-off Meeting	Included	2-4 weeks after contract execution
Implementation Goals	Included	Defined during Kickoff
Success Matrix	Included	Defined during Kickoff
Initial Project Schedule	Included	Defined during Discovery
Data Gathering Guide	Included	Defined during Discovery
<b>Project Design &amp; Requirements</b>		
Solution Document	Included	Requirements & Solution Design
<b>Project Configuration &amp; Testing</b>		
	Home	



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Phase & Deliverables	Scope	Comments
Core Modules	Projects Calendar Contacts Setup	
Planning Module	1-Template	
Cost & Funding Module	3-Templates	<ul style="list-style-type: none"> <li>Funding</li> <li>Budget</li> <li>Cash Flow</li> </ul>
Process Module	5-Processes	Structured Workflows: <ul style="list-style-type: none"> <li>Contract Execution</li> <li>Pay App / Invoice Approval</li> <li>Design Review</li> <li>Potential Change Order</li> <li>Change Order</li> </ul>
Forms Module	1-Form	Form Type: <ul style="list-style-type: none"> <li>Meeting Minutes Action Item</li> </ul> +60 Standard Forms
Schedule Module	1-Template	
Document Module	1-Template	
Bidding Module	Standard	
Dashboard Module	1-Dashboard	<ul style="list-style-type: none"> <li>Project Management Summary</li> </ul> +1 Admin Dashboard and Executive Summary
Reports Module	Standard	+ 1 Log Report per Process +120 Standard Reports
Submittal Module	Standard	
Import Toolkit	Standard	+Use Training
<b>Project Training &amp; Adoption</b>		
Admin Training	1- Session Onsite	3 days Duration/ 5 Users Maximum
End User Training	2- Sessions Onsite	2 days Duration Each/15 Users Maximum
Train-the-Trainer	1- Session Onsite	2 days Duration/ 8 Users Maximum
Adoption Calls	4-Calls	Weekly call for 4-Weeks – Scheduled and Conducted by e-Builder Professional Services.

## Other Annual Subscription Detail Items

### *Amazon Web Services (AWS) GovCloud (US)*

e-Builder is able to offer its clients AWS GovCloud (US) which is an isolated AWS region designed to host sensitive workloads in the cloud, ensuring that this work meets the US government's regulatory and compliance requirements.

The GovCloud (US) isolated AWS Region addresses the specific regulatory and compliance requirements of U.S. government agencies and customers moving sensitive workloads to the cloud. AWS GovCloud (US) provides a turn-key service to meet government compliance for hosting and delivering SaaS solutions such as e-Builder Enterprise.

- AWS GovCloud (US) is compliant with the Federal Risk and Authorization Management Program (FedRAMP) requirement.
- AWS GovCloud (US) adheres with U.S. International Traffic in Arms Regulations (ITAR).

The Federal Risk and Authorization Management Program (FedRAMP) is a government-wide program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services. FedRAMP is mandatory for Federal Agency cloud deployments and service models at the low and moderate risk impact levels. Additional information on FedRAMP, including the FedRAMP Concept of Operations (CONOPS) and Guide to Understanding FedRAMP, can be found at: <http://www.fedramp.gov>.

Please note that AWS GovCloud (US) provides a FedRAMP compliant hosting environment; however, the e-Builder Enterprise application is not currently FedRAMP compliant.

To learn more about the AWS GovCloud (US), please visit:

<http://aws.amazon.com/govcloud-us/>.

## Customer Responsibilities & Implementation Assumptions

The following responsibilities and assumptions are necessary for the successful completion of this implementation. In the event that an item below does not occur in the manner or time frame defined, e-Builder may request to meet with the Customer and mutually agree upon an adjustment to the schedule, work activities and fees.

- The Customer will make best efforts to ensure the committed participation of all appropriate technical and user personnel throughout the project, including but not limited to periodic status reviews. Customer resources provided during the technical and functional sessions must be empowered to make decisions on project direction.
- The e-Builder implementation team will work jointly with the Customer team to resolve all issues including those impacting the scope and timeline. Issues that may impact the progress and the schedule will be documented. If the issue is critical, e-Builder will present the issue to the Customer in writing as quickly as possible. Once the issue is presented in writing the Customer is expected to respond within two (2) business days. If the issue cannot be resolved within two days, they will notify e-Builder and arrange a meeting with all relevant personnel to resolve this issue. Failure to do so could impact the cost and schedule of the e-Builder implementation project.
- All necessary content (data, text and graphics) will be provided to e-Builder prior to the creative processes (if applicable).
- Unless specifically identified as deliverables within this document, Customer will enter any historical data from past projects to enable historical analysis.
- Unless specifically identified as deliverables within this document, data migration, system integrations or custom development of any kind is not included within the scope of the e-Builder implementation project. These items can be included through the change management process if identified as required items.
- All change requests received and approved will be listed on a contract Addendum or Work Order. Each Addendum or Work Order must be signed and accepted prior to initiating additional work by e-Builder.





e-Builder is the leading provider of integrated, cloud-based construction program management software for top facility owners and the companies that act on their behalf. The company's flag-ship product, e-Builder Enterprise™, improves capital project execution, resulting in increased productivity and quality, reduced cost, and faster project delivery. Since 1995, e-Builder's technology leadership and construction industry focus has provided thousands of global companies, government agencies, and healthcare and education-al institutions managing billions of dollars in capital programs with solutions to improve the plan, build, and operate lifecycle.

# e-Builder Enterprise

## *Project Management Software Tool*

### Implementation Process & Next Steps

October 15, 2019



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## 1. Upon Execution of Contract

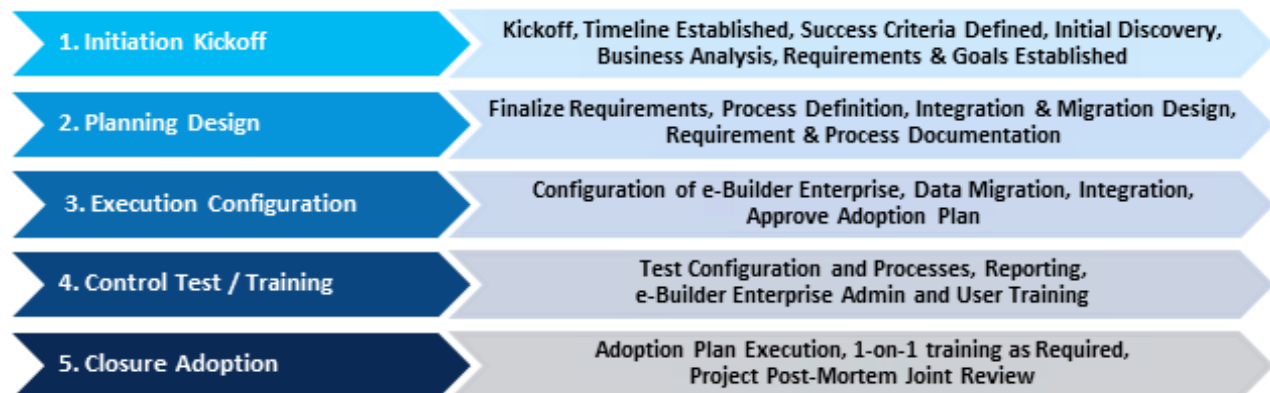
1. One (1) to two (2) weeks after contract signing e-Builder will assign an implementation team consisting of a Program Director, Program Manager, Project Manager, and at least one (1) Business Analyst.
2. After team assignment, e-Builder will conduct an Internal Handoff meeting with the assigned implementation team to review the Task Order, contract, and other information/documentation that e-Builder received prior to execution.
3. After the Internal Handoff meeting, an Executive Introduction call will be conducted by the Program Director to introduce the team and discuss next steps, including the scheduling of the Kickoff meeting and the creation of the actual project implementation schedule.

## 2. e-Builder Best Practice Implementation Summary

e-Builder's implementation methodology has been continuously refined over the course of more than 400 successful implementations. e-Builder's ability to get the proposed solution implemented on time and on budget is a differentiator in today's economic environment.

The e-Builder implementation approach includes the degree of flexibility required to meet the Customer's specific needs and time constraints. Our broad range of deployment tools, our team members' experience and our focus on the construction industry allows for rapid deployment to minimize risk while maximizing return on investment.

The Customer will benefit from our collected industry best practices and successful implementation track record. Part of this success is based on e-Builder's adherence to a proven implementation methodology modeled after the Project Management Institute's (PMI) recommended 5-phase project implementation approach illustrated below.



### 2.1 e-Builder Enterprise Implementation Process and Major Phases

#### I. Phase I – Initiation & Kickoff

Phase I of the implementation of e-Builder Enterprise gives the combined Customer and e-Builder Project Teams the time and exposure to learn, discover and document the existing project delivery standards, methodologies and procedures. In addition, the e-Builder Project Team will collect and analyze all existing forms, reports, requirements, systems, and documentation. During this Phase, the e-Builder Project Team will also submit and obtain Customer approval of project timelines, goals and objectives, risks and develop the change and communication plans for Project roll-out during Phase III. This Phase includes activities to learn the Customer's way of delivering projects, including the following activities and deliverables:

- Project Kickoff
- Project Discovery

- Data/Requirements Gathering
- Customer Staff & Department Interviews
- Discovery Documentation

## **II. Phase II – Planning & Design**

Phase II consists of a series of interactive design workshops, conducted by the e-Builder and Customer Project Teams. The results of these workshops are a clear definition and documentation of all applicable processes that will be deployed in e-Builder Enterprise. Working with the Customer project team, the e-Builder implementation team will gather detailed process design requirements for the implementation of e-Builder Enterprise and capture those requirements in detailed design diagrams.

At the completion of this Phase, the e-Builder Project Team can begin configuring and testing e-Builder Enterprise for deployment. The e-Builder implementation team will work with representatives of the Customer, including but not limited to any subject matter experts identified by Customer, to validate the process definitions. This Phase will include the following design activities and deliverables:

- Design Workshops
- Process Definitions
- Solutions Requirements Document

## **III. Phase III – Configuration & Test**

Phase III is the configuration of e-Builder Enterprise. During this Phase, the e-Builder implementation team will use the Discovery and Design documentation captured during Phases I & II to setup and configure e-Builder Enterprise and ensure it meets the requirements found in this Scope of Work, including but not limited to the defined requirements for delivering Customer projects. Following configuration, the e-Builder implementation team will execute User Acceptance Testing (UAT) with the participation of the Customer on all e-Builder Enterprise components prior to any deployment. The outcome of testing for this Phase will be the delivery and Customer acceptance of all items defined in the Task Order. The configuration and testing activities and deliverables include:

- System Configuration
- Discovery and Design Document Updates
- Reporting
- UAT Plan

## **IV. Phase IV - Training**

At completion of configuration and testing, the e-Builder Implementation team will train on the use of e-Builder Enterprise. System administrative training, end user training and train-the-trainer sessions will be conducted onsite with the Customer Team. The outcome of the training for this Phase will be the completion of the training package to enable Customer administrators and users to utilize e-Builder Enterprise fully.

- **Administrator Training** – This training is for those users the Customer has assigned accountability for maintaining e-Builder post-implementation. These super-users will be trained on the detailed aspects of e-Builder Enterprise setup and configuration. Administrators will learn how to perform such key tasks as: create new projects, users, reports, and workflows. They will have the ability to manage the e-Builder Enterprise configuration as the Customer's processes evolve over time.

## **Exhibit B: Task Order and e-Builder Enterprise Project Management Software Tool Implementation Process**

- **User Training** – User training is provided in a series of sessions. This training is process/role based and all users may not need to attend every session. The e-Builder implementation team will provide a training agenda detailing the sessions and users who need to attend each session. e-Builder provides the initial User Training for a portion of the Customer’s users.
- **Train-the-Trainer** – The Customer will train the remaining users after the e-Builder trainers train the initial Customer users. Train-the-Trainer training will be provided to those persons the Customer has identified as its ongoing trainers in a series of sessions. This training covers the process/role-based user training, operation of key e-Builder Enterprise functionality and detail on recommended training materials and methods.

After the completion and delivery of all testing and training requirements, the Project will transition into e-Builder Adoption & Ongoing Support. The training activities and deliverables include:

- Training Documentation
- Training

### **V. Phase V - Closure & Adoption**

Following the rollout of e-Builder Enterprise, the e-Builder implementation team in Phase V will review the System use and will be onsite for two (2) weeks of onsite support.

- **Onsite Support** – e-Builder will provide Customer with a combination of training and hands-on support for users and administrators immediately following the system go-live. e-Builder will provide an experienced resource who will be onsite to “walk the halls”, provide one-on-one assistance where needed and additional training or refresher sessions for users.

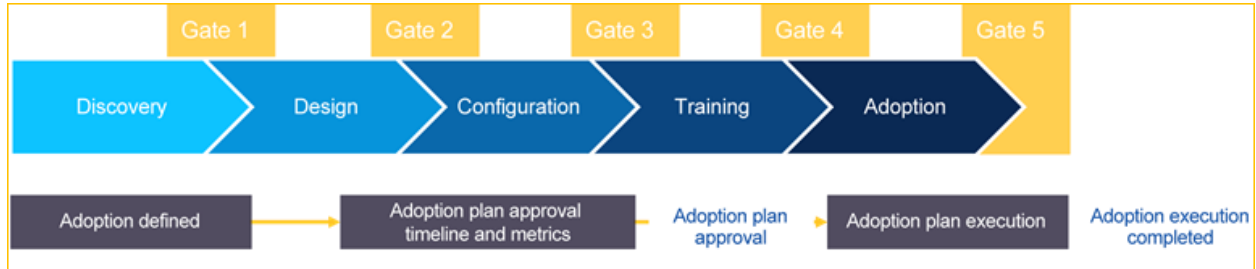
In addition, the e-Builder Implementation Team will initiate calls to the Customer users to collect any feedback or lessons learned. If needed, the team will also provide additional training. The feedback and lessons learned will be used to optimize Customer processes or configuration as needed. The e-Builder implementation team will communicate any findings and recommend actions to course correct. This Phase is not complete until the success criteria the Customer defined in Phase I Initiation & Kickoff and Phase II Planning & Design is achieved. The adoption activities and deliverables include:

- User Acceptance Testing Documentation (tests all passed)
- Adoption & Support



## 2.2 Implementation Gate Approach

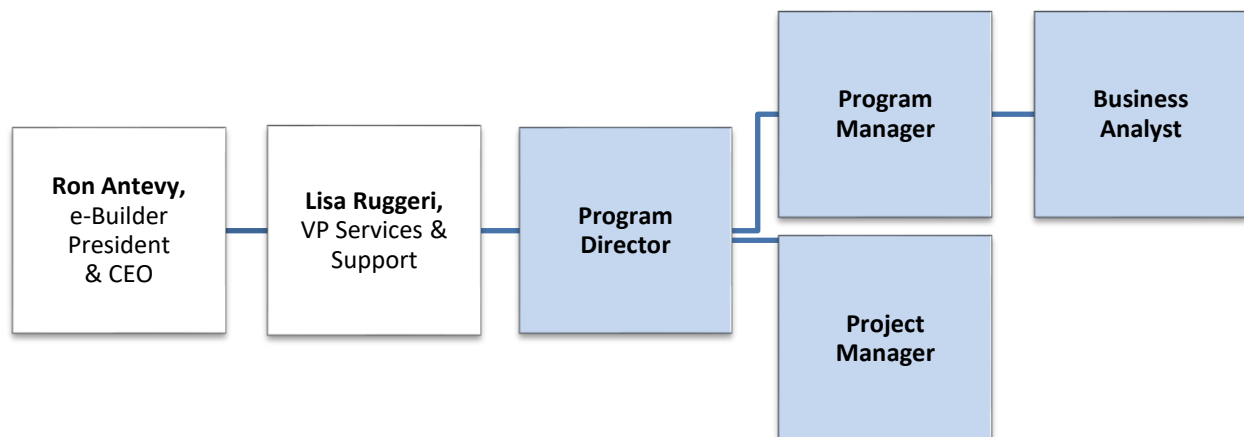
Between each phase of the implementation a gate meeting is held as an opportunity for Customer to review the current scope and timeline of the project and to openly communicate all potential risks and mitigations. This is to ensure that constant communication is occurring at the executive level of the project.



## 3. Project Organization

The e-Builder staff to be assigned to Customer's implementation project consists of a Program Director, Program Manager, Project Manager, and at least one (1) Business Analyst.

The following organization chart illustrates the reporting relationships of the e-Builder team working directly with the Customer. During the implementation, the Customer will have a communication path to e-Builder executive management through the Project Manager.



Role	Description
<b>Program Director</b>	Oversees the implementation process and assists in escalation activity as needed being the liaison between Customer and e-Builder executive teams. Also manages the performance of Project Managers and Business Analysts ensuring project delivery that is on time, on budget, and of high quality. The Program Director oversees e-Builder implementations for multiple clients and will be involved with the Customer on a regular basis from project start to finish.
<b>Program Manager</b>	Ensures that the e-Builder Business Analyst offer best practices options for Customer business process/requirements and develops corresponding process and data flows. The Program Manager also reviews configured instances of e-Builder Enterprise to ensure the configuration is based on requirements and business rules.

Role	Description
<b>Project Manager</b>	Works directly with Customer's Project Manager and Team throughout all Phases of the implementation and accountable for project completion. Responsible for managing the project scope, schedule and quality. The Project Manager may be involved with other e-Builder client implementations but will be involved frequently with the Customer.
<b>Business Analyst</b>	An industry expert working with the Customer's project team to execute system configuration, data validation, testing, training and other tasks related to the e-Builder Enterprise rollout. The Business Analyst brings best practices to the implementation and will reach out to other e-Builder resources when needed. The Business Analyst will be focused primarily on the Customer's implementation and may be less involved during times when a Software Engineer will be involved developing custom integrations.
<b>Software Engineer</b>	The Software Engineer will become part of the Customer's implementation team to support activities related to integrations, such as interfacing or exchanging data between e-Builder Enterprise and other sources.

#### 4. e-Builder Implementation Documentation

The following documents described below the Customer can get acquainted with to help form the basis for the start of the Initiation & Kickoff Phase in e-Builder's implementation process. All of these documents are located [HERE](#).

- *Choosing the Perfect Admin* – 1-page guide that identifies the right candidate for the e-Builder Administrator role. This can be used to help the Customer identify possible internal resources and help build out a possible recruitment plan.
- *e-Builder Standard Form Samples* - List of forms for view. Make some decisions preliminary that catch the Customer's eye and that might be important for Customer operations. Also make a note of those that might need to be tweaked.
- *Discovery Topic Overview* - list of topics the e-Builder implementation team will cover during the Initiation & Kickoff Phase.
- *e-Builder Enterprise – Dashboards and Reports Overview* – List of e-Builder's out-of-the-box reports for view. Again, make some decisions preliminarily that catch the Customer's eye and make a note of those that might need to be modified.
- <http://www.e-builder.net/support/optimization> - optimization page to pass on to IT to ensure the user experience is set up the right way from the beginning for each user.
- <http://www.e-builder.net/component> - once the optimization page above is complete, refer to this page to download the plugins for each computer once to provide the best user experience.



e-Builder is the leading provider of integrated, cloud-based construction program management software for top facility owners and the companies that act on their behalf. The company's flagship product, e-Builder Enterprise™, improves capital project execution, resulting in increased productivity and quality, reduced cost, and faster project delivery. Since 1995, e-Builder's technology leadership and construction industry focus has provided thousands of global companies, government agencies, and healthcare and educational institutions managing billions of dollars in capital programs with solutions to improve the plan, build, and operate lifecycle. The company is headquartered in Plantation, Florida.  
For more information, visit [www.e-Builder.net](http://www.e-Builder.net).