TeamDynamix

WORK
BETTER TOGETHER

Life is complicated enough …
We make it **easier**.

Statement of Work Prepared for:

The City of North Port Police Department

Prepared

12 December 2024

Statement of Work

Introduction

City of North Port Police Department (herein known as 'CLIENT') is located in North Port, FL. CLIENT wishes to implement the best-in-class solutions from TeamDynamix. In summary, the following capabilities are in-scope for this engagement:

- TeamDynamix Multi-Tenant SaaS Deployment with standard URL
- TeamDynamix Administration Foundations
- TeamDynamix Core Integrations
- Basic Ticketing
- Advanced Ticketing
- Client Portal
- Service Catalog
- Knowledge Management
- Asset Management
- Reporting

Solution Environment

- TeamDynamix Software-as-a-Service (SaaS)

Project Approach and Timeline

TeamDynamix has developed an implementation approach to ensure the success of its clients. The implementation will begin with a planning exercise to discuss specific factors which influence the timeline of the deployment. Following the planning exercise, CLIENT resources shall attend application training courses and learn how to configure the TeamDynamix applications. The training sessions are instructor-led, delivered online, and typically last 90-120 minutes. The number of sessions depends on the applications that are to be implemented. Each session may have pre-requisite videos and follow-up activities such as configuration steps and lab exercises.

Once the training courses conclude and CLIENT has completed the prerequisite configuration activities, one-on-one dedicated sessions with a TeamDynamix Professional Services consultant shall begin. CLIENT will meet regularly with a TeamDynamix consultant to further build on knowledge from the training course and jointly configure the application(s) to meet specific requirements. Following configuration, the solution is transferred into production once training and go-live preparation steps have been completed. If defined during the planning exercise, additional phases follow the initial go-live. If no follow-on phases have been defined, CLIENT is then introduced to Support and Customer Success and the implementation project is closed-out.

Most clients progress through the implementation between three and six months depending on the complexity of requirements and their resource availability. TeamDynamix and CLIENT will work together to

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coordinate specific dates once the Statement of Work has been fully executed. TeamDynamix shall make available its Professional Services resources for the period of time established during the planning exercise. Changes to timeline or scope may require a signed change order document and/or additional costs, especially if Professional Services resources must be extended beyond the time period outlined in the implementation plan. If for some reason CLIENT chooses to place the implementation on-hold, TeamDynamix resources shall be reassigned to other projects. The scope of services outlined with this Statement of Work expires 10 months from document execution (unless modified by a change order) and all work shall then be considered complete.

Departments Included

CLIENT may wish to deploy TeamDynamix to multiple departments. Departments can be deployed simultaneously or in phases. If deployed in phases, CLIENT should plan for its primary TeamDynamix administrator to participate in all phases to ensure continuity and build upon knowledge gained in previous phases.

The following departments are considered in-scope for this engagement:
Police Department

Key Contacts

The following individuals will serve as key contacts for the coordination of this engagement.

City of North Port Police Department
Name: John McDowell
Title: Commander
Phone: 941-429-7357
Email: jmcdowell@northportpdfl.gov

TeamDynamix Professional Services
Name: Aaron Crane
Title: Vice President, Operations
Phone: 614-340-3342
Email: acrane@teamdynamix.com

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Scope of Services

Project Management

Implementation Project Management
TeamDynamix and CLIENT shall jointly manage the implementation project. TeamDynamix shall take the lead on facilitating the sessions related to the application deployment. CLIENT shall manage its resources, sponsor/stakeholder expectations, and end-user communications. Members of TeamDynamix and CLIENT will work together on the specific project management-related items, such as: • Project background, objective and vision • Project scope • Team roles and responsibilities • Project timeline • Project management tools and communication plans • Outline tracking procedures for risks and issues • Determine future meeting cadence • Review deliverables and action items CLIENT Responsibilities: • Provide a project manager to coordinate with TeamDynamix resources. • Identify and coordinate other individuals involved in the project, such as Sponsor, Administrators, Technical resources, Process owners and other Subject Matter Experts. • Create and manage the documentation and plans required for CLIENT-specific project management processes. • Ensure its resources are completing activities and actions in a timely manner so that project timeline is met. TeamDynamix Responsibilities: • Provide resources to act as a project manager, application consultant, and technical lead. Resources shall work closely with CLIENT project manager to execute the implementation plan. • Meet with CLIENT project resources on a regular basis to discuss project status and review progress to plan. • Respond to and help address issues that arise in a timely fashion. • Help to ensure the overall success and completion of the project.
Core Setup
TeamDynamix consultants shall create a SaaS Production and Test (Sandbox) environment of the TeamDynamix application for CLIENT. The environments will be accessible via a TeamDynamix-assigned URL (e.g. https://clientname.teamdynamix.com) and will exist within the TeamDynamix multi-tenant environment. CLIENT Responsibilities:

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• Provide an initial set of users that need access to the TeamDynamix application.

TeamDynamix Responsibilities:

• Perform environment setup tasks for a Production and Sandbox instance of the TeamDynamix application.
• Provide CLIENT with System Access Information.

Application Configuration

Solution Workshops
TeamDynamix consultants will provide CLIENT access to the Solution Workshop Course(s). The purpose of the curriculum is to introduce CLIENT to the applications and to transfer knowledge related to each module. TeamDynamix consultants place an emphasis on transferring knowledge to CLIENT resources as a way to best address requirements. Activities covered in the workshop include:
Introduction to TeamDynamix: • Environment overview • Maintenance and release schedules • System Status • Solutions Client Portal
Administration Foundations: • Setting up additional Administrators • TeamDynamix security model • User groups • Account/Department values • Building locations and rooms
Core Integrations: • Methods of authentication to TeamDynamix • Email management • Managing people records • Microsoft Teams and Slack integration
Client Portal: • Branding and styling the Client Portal • Adding headers and footers • Client Portal pages • Site-level settings
Knowledge Management: • Creating knowledge base articles • Building categories • Knowledge-specific security roles • Article and category visibility settings • Notification templates
Service Catalog:

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• Defining and configuring services
• Building service categories
• Leveraging Ticket Type values
• Configuring Service templates
• Determining visibility permissions

Ticketing Essentials:

• Ticket creation
• Application security roles
• Service forms
• Custom attributes
• Status values
• Impact, Urgency, and Priority values
• Source values
• Ticket settings

Advanced Ticketing:

• Service Level Agreements
• Notification templates
• Ticket and Task templates
• Response templates
• Satisfaction surveys
• Automation rules
• Workflows and workflow step types (e.g. Approval steps, Conditional steps)

Reporting:

• Out-of-the-box reports
• Building reports with the Report Builder tool
• Scheduling reports
• Adding reports to desktops (i.e. Dashboards)
• Sharing reports and visibility settings

CLIENT Responsibilities:

• Fully participate in the Solution Workshops
• Review activities covered within each session topic and complete hands-on activities/lab exercises
• Complete all pre-requisite activities prior to the start of one-on-one consulting sessions with CLIENT's assigned implementation team.
• Come prepared to each session in order to engage in discussions related to items above.
• Commit to spending time following training activities to continue building expertise.

TeamDynamix Responsibilities:

• Provide access to the Solution Workshop, agenda, and necessary materials.
• Support CLIENT through course activities, addressing questions and issues.
• Following the completion of Solution Workshop activities, assign consultant to CLIENT's implementation project to address specific requirements during configuration sessions.

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Configuration
Following the Readiness Course, TeamDynamix consultants shall facilitate configuration sessions to further demonstrate, transfer knowledge, and assist CLIENT System Administrators with implementing the application's capabilities. During configuration sessions, CLIENT and TeamDynamix shall discuss specific requirements and use cases applicable to CLIENT. TeamDynamix shall offer advice on how best to apply the application's feature-set.
Foundations Configuration: • Provide guidance to CLIENT on how best to further configure Foundational elements of TeamDynamix (e.g. Accounts/Departments, Security Roles, Locations, etc.) following the Readiness course.
Core Integrations Configuration: • Work with CLIENT technical resources to configure Single Sign-on authentication via a SAML 2.0 Identity Provider. CLIENT must supply SAML metadata via a URL or the InCommon Federation so that TeamDynamix can establish a regular metadata synchronization process. • Work with CLIENT technical resources to configure up to three (3) inbound email monitors. In order to leverage this capability, CLIENT must provide an IMAP-enabled email account that supports OAuth authentication to which the email service can connect. IMAP is not necessary for email processing, but it is used by the TeamDynamix application for mailbox administrative purposes. Instructions and prerequisites shall also be provided by TeamDynamix during the implementation. • Support CLIENT TeamDynamix System Administrators when building additional email monitors, if applicable. • Work with CLIENT technical resources to configure the Email Replies monitor and Email Sender settings. • Coach and support CLIENT technical resources working on user synchronization activities. TeamDynamix has a file import listener utility that can be deployed in the CLIENT environment and will pickup dropped files (e.g. CSV, XLS). TeamDynamix can review and assist with the deployment of this utility if this is the desired approach.
Client Portal Configuration: • Provide guidance to CLIENT on how best to layout and design Client Portal. • Provide sample Client Portal layouts from similar implementations. • If necessary, support CLIENT web developer assigned to Client Portal design • Assist with Client Portal configuration and layout
Knowledge Management Configuration: • CLIENT shall identify a list of up to twenty (20) knowledge base articles that shall be used as the basis of the Knowledge Management training and configuration activities. • TeamDynamix shall coach client on how best to apply the capabilities of the knowledge base application and will then support the configuration effort of the up to twenty (20) identified articles. • CLIENT may add additional articles on its own timeline. If CLIENT desires additional assistance beyond twenty (20) articles, TeamDynamix can provide a separate scope of effort and input on how the implementation timeline may be impacted.
Service Catalog Configuration: • CLIENT shall identify a list of up to twenty (20) service offerings that shall be used as the basis of the Service Catalog training and configuration activities.

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• TeamDynamix shall coach client on how best to apply the capabilities of the Service Catalog application and will then support the configuration effort of the up to twenty (20) identified services offerings. • CLIENT may add additional service offerings on its own timeline. If CLIENT desires additional assistance beyond twenty (20) service offerings, TeamDynamix can provide a separate scope of effort and input on how the implementation timeline may be impacted.
Ticketing Configuration: • Coach CLIENT on how best to apply essential ticketing features based on requirements and support the configuration effort. • Build up to ten (10) ticket forms and support CLIENT TeamDynamix System Administrators during additional form building exercise. CLIENT must provide field definition and layout. • Provide best practice advice and support CLIENT when adding and managing custom attributes and cascading values.
Advanced Ticketing Configuration: • Provide guidance to CLIENT on how best to use the advanced ticketing capabilities based on requirements and support the configuration effort. • Build up to three (3) ticket workflows and support CLIENT TeamDynamix System Administrators during additional workflow building exercise. Workflows can be used to support common business process such as on/off-boarding, major incident processes, and system change management. CLIENT must provide detailed process documentation and explanation. • Build up to five (5) ticket automation rules and support CLIENT TeamDynamix System Administrators when building additional automation rules. CLIENT must provide conditional routing explanation. • Assist with customizing notification templates and response templates.
Asset Management Configuration • Coach CLIENT on how best to apply asset management features based on requirements and support the configuration effort. • Build up to ten (10) asset forms and support CLIENT TeamDynamix System Administrators during additional form building exercise. • Assist CLIENT with deploying asset synchronization utility, if necessary. Asset synchronization utility can be deployed within CLIENT environment and connect to an asset data source (e.g. SCCM) for synching asset inventory to TeamDynamix.
Reporting and Dashboards • Facilitate a reporting workshop session and demonstrate how to create reports, configure desktops/dashboards, schedule/share reports and discuss reporting best practices. • Provide common examples of key operational reports to aid CLIENT when making decisions on reporting. • Custom report development is not in-scope for the implementation.
CLIENT Responsibilities: • Responsible for primary TeamDynamix configuration with support provided by TeamDynamix. • Communicate desired state processes and make decisions on configuration options provided by TeamDynamix consultants. • Assign resources with the availability and skill set required to work with the TeamDynamix suite of applications.

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TeamDynamix Responsibilities:

• Coach and guide CLIENT through implementation to ensure the feasibility within the amount of time scoped.
• Assist CLIENT with configuration tasks, when possible, to help maintain implementation momentum.
• Support configuration efforts and assist with importing configuration data, when possible (not all areas of the application support configuration imports). TeamDynamix is not responsible for any data cleansing or manipulation prior to the use of any import tools

Solution Testing

CLIENT Responsibilities:

• Create any necessary system test scripts and/or user acceptance test scripts required to meet internal testing requirements.
• Plan and perform system and/or user acceptance testing.
• Coordinate internal resources involved in the testing processes.

TeamDynamix Responsibilities:

• Provide go-live checklists and support client through configuration testing by responding and working to resolve issues.
• Perform unit testing on any workflow or integration activities developed by TeamDynamix consultants.

Solution Training

TeamDynamix provides training services as part of its implementations to prepare TDNext users for go-live. CLIENT and TeamDynamix will work together to coordinate training for TDNext users. TDNext users training is accomplished via a combination of training sessions, workshops, standard training videos, and knowledge base articles.

CLIENT Responsibilities:

• Identify resources that shall be the TeamDynamix System Administrators.
• Ensure the availability of the designated System Administrators throughout the course of the implementation.
• Coordinate and communicate TeamDynamix training plan to TDNext users prior to training sessions.
• If TeamDynamix training is performed on-site, CLIENT must provide a training lab with internet-connected computers.
• Communicate business processes that are changing as a result of the implementation. Additionally, create any supplemental documentation to support the changing business processes.

TeamDynamix Responsibilities:

• Provide Administrative training to individuals (typically 1-3) assigned as TeamDynamix Administrators by CLIENT. Administrative training takes place throughout the implementation, not via a dedicated Administration training course.
• Provide up to 1 live, instructor-led TeamDynamix application training sessions. CLIENT and TeamDynamix will decide on the training agendas during the implementation planning process. CLIENT may record training sessions for internal-use only.

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• Provide up to 1 open-house/workshop session (60-90 minutes each) for staff to receive answers to questions about the TeamDynamix application. CLIENT may record open-house/workshop sessions for internal-use only.
• Provide access to standard training support materials available at the time of implementation.

Go-Live Support

TeamDynamix and CLIENT shall collaborate on a go-live strategy during the implementation. Following a 30-day go-live support period, the project will be closed out.

CLIENT Responsibilities:

• Communicate the go-live strategy to key stakeholders and the user community.
• Determine how work items from legacy applications will be addressed post go-live.
• Provide access to resources and systems to support the go-live.
• Participate in project close-out meeting and take full ownership of the TeamDynamix configuration.
• Understand that future changes to TeamDynamix configuration are the responsibility of the CLIENT.
• Direct future questions and issues to the TeamDynamix Support organization

TeamDynamix Responsibilities:

• Provide early life support to quickly identify and provide resolution to issues.
• Facilitate project close-out meeting and ensure CLIENT has necessary information to maintain solution going forward.
• Ensure CLIENT has any necessary credentials and access information related to the configuration.
• Provide support information and make introductions to TeamDynamix Customer Success Representatives.

Out-of-Scope

The following items are considered out-of-scope:

• Vanity URL

• Asset Discovery

• Project Management Essentials

• Advanced Project Portfolio Management

• Capabilities of the TeamDynamix solution not mentioned in the above Scope of Services

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Cost Summary

Description		Total
Professional Services - Implement TeamDynamix applications		|$10,800.00
Total TeamDynamix Professional Services		**|$10,800.00**

Payment Schedule

1. One third (33%) of total professional services fees following the implementation planning phase or eight (8) weeks after the contract execution date, whichever comes first.
2. One third (33%) of total professional services fees following the completion of configuration of TeamDynamix or sixteen (16) weeks after the contract execution date, whichever comes first.
3. Remaining percentage (34%) of total professional services fees following the completion of End User Training activities or twenty-four (24) weeks after contract execution date, whichever comes first.

Acceptance

By signing below, CLIENT acknowledges that they have completely read and fully understand this Statement of Work document. CLIENT understands that (a) a complete set of requirements is necessary before TeamDynamix can begin any configuration or integration services; (b) additional requirements introduced after requirements approval may not be possible to incorporate or may require a change order for additional services; (c) timely feedback is necessary to complete any configuration or integration services on schedule; (d) they must take ownership of the applications, configuration, and/or integrations delivered by TeamDynamix Professional Services and future changes are the responsibility of CLIENT or must be made as part of an additional Professional Services engagement; (e) active participation during and after training sessions is crucial to CLIENT's success; (f) frequent meeting cancelations, "no shows", or changes to CLIENT project resources will have an impact on timelines and repetitive occurrences may result in additional costs and/or changes to schedules.

TeamDynamix Solutions LLC

Signed by:

Signature **ken Benvenuto**
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Print **Ken Benvenuto** _____

Title **CEO** _____

Date **1/21/2025** _____

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Approved by the City Commission of the City of North Port, Florida on _____, 2025.

CITY OF NORTH PORT, FLORIDA

_____

A JEROME FLETCHER, II, ICMA-CM, MPA
CITY MANAGER

ATTEST

_____

HEATHER FAUST, MMC
CITY CLERK

APPROVED AS TO FORM AND CORRECTNESS

_____

MICHAEL GOLEN, CPM
INTERIM CITY ATTORNEY