Statement of Work

Web Based On Line Training Project
Version 1.3 • September 27, 2018

SAFD

INTRODUCTION: Statement of Work

What This Is

Template for creating a document to officially identify the work associated with a project from a vendor. The Statement of Work is a comprehensive document for the vendor to detail their offering to satisfy the project goals and objectives communicating the deliverables and structure for the implementation. It briefly defines:

- Project Summary
- Project Management
- Implementation of Work
- Software and Hardware
- Project Assumptions / Risks
- Payment Milestones
- Recurring Costs

Why It's Useful

The Statement of work defines the expectation of the vendor's interaction with the City of San Antonio while providing the IT Governance Board information for internal approval. The document will be the guide for future project documentation as to what products, customization, and services will be provided. The signed document provided authority to move forward with the project.

How to Use It

1. When a vendor has been chosen based on the procurement process, the vendor will be responsible to complete the Statement of Work. A team approach is recommended to capture the intent of the project within the vendor's work as understood by the IT Governance Board.

2. Use the template as a guide. The existing language is meant to assist all parties in creating a thorough SOW that covers all work to be accomplished.

3. Use information from the early project proposal, project charter, any business case information created during the proposal investigation, any costs identified and other information gleaned from early feasibility analysis to assist the vendor in developing the Statement of Work.

4. Use the Requirements Appendix as a way to organize all tasks listed in the SOW. This product will assist with building the project schedule and Project Management Plan.

5. Get official executive sign-off on the Statement of Work. Ensure the SOW is communicated to functional executives whose people will be needed for the project.

6. Officially kick off a team to move forward with this project.

7. Have the team review the SOW together and discuss the goals and constraints and assumptions to ensure that everyone starts the project with a common understanding.

8. Keep the SOW visible and review it during the Initiation and Planning work of the project, to ensure further project definition work stays true to the original business goals.

VERSION: 1.1   **REVISION DATE:** July 14, 2018

Document Version #	Change Description	Author	Date
0.1	Initial draft	HWB	June 20, 2018
1.1	Combine TS SOW w COSA SW	HWB	July 14, 2018
1.2	Revise SOW for SaaS implementation	HWB	July 31,2018
1.3	Revise section 6.0 payment milestones	HWB	Sept 27, 2018

Approval of the Statement of Work indicates an understanding of the purpose and content described in this deliverable.

Approver Name	Title	Signature	Date
Kevin Holmes	Executive Sponsor, COSA Department Director		
Charles Hood	Executive Sponsor, SAFD		
Vance Meade	Executive Sponsor SAFD		
Andrew Estrada	SAFD		
Phil Coons	Target Solutions	*[signature]*	10/4/18

Sign off by Sponsors and/or Stakeholders

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1.0 Project Summary

The San Antonio Fire Department Training Division currently conducts continuing education by online training module. All required State and Federal tracking of continuing education is done through this application. The online system is utilized because of its ease of access, increases the amount and types of training, provides a greater number of available subjects, simplification of tracking of training and certification, standardization of presentation, ensures compliance with completion of local, State and Federal training requirements. Additional required training such as for special teams or assignments is conducted by various methods and has no standardized tracking method. The Intent of this project is to fully implement the capabilities of the web-based training available through Target Solutions LMS and migrating existing training records from Centrelearn LMS, which is now owned by Target Solution, and is the current SAFD LMS provider.

1.1 Project Scope

The new solution will produce web-based online training and provide the following:

- Wholly web based solution available on most hardware platforms, such as desktop and laptop computers, mobile computers, tablets and cellular phones.
- TCFP required Continuing Education training content.
- Provide project management support for the configuration and implementation of the Target Solution platform.
- Provide import process for new employee and transferred employee files.
- Define with SAFD reports required to be developed, if not in standard reports

Implementation, Training and Maintenance:

- Full implementation of Target Solutions platform.
- Provide the migration of all existing Centrelearn training records into Target Solution platform.
- Provide import process for new employee and transferred employee files.
- Define with SAFD reports required to be developed, if not in standard reports
- Continually enhance the solution to support industry best practices and requirements for local government, confirm library of content supports TCFP yearly variations.
- Implementation will not compromise ongoing operations. Confirm that CE begun in Centrelearn will not be impacted as migration to Target Solutions.
- Comprehensive training to SAFD and ITSD staff through implementation and start-up and provide user manuals.
- Define annual maintenance, upgrade path.
- Define any Users Conferences or administration support training offered.

The scope of this engagement includes all activities required to support to the deliverables and activities described above, including:

1. Project and quality management
2. End user training

1.2 Out of Scope

Anything not included in the Request for Proposal (RFP), Requirements Traceability Matrix (RTM) and Proposal document is considered out of scope. This may change based on the discovery meetings when additional functionality is identified. Any future changes that are approved by the City will be documented in an updated SOW. Additional functionality not represented in the RFP, response, and this SOW will result in a Change Request (CR) and potential additional costs.

2.0 Project Management

2.1 Target Solutions Responsibilities

Target Solutions' Project Manager is the City's primary point of contact for this engagement. Target Solutions project manager is accountable for ensuring resource availability, managing communications across project teams, monitoring project progress at the macro level against the project timeline and ensuring that the work items included in each release are appropriately developed based on the scope and requirements of the project.

Target Solutions Project Manager and other key personnel shall support overall Project objectives and work effectively with the COSA's Project Manager, Project team and Project Stakeholders, and shall function as the liaisons between the COSA's Project Manager and Target Solutions on all matters relating to the Project.

Target Solutions shall continuously coordinate with the COSA's Project manager. In doing so, Target Solutions shall maintain, and make available to the COSA, a detailed directory of the team and contact points, including (but not limited to) company, name, and title.

COSA at its sole discretion shall have the right to remove any of the Target Solutions employees or subcontractors. Upon written notifications, Target Solutions shall remove and replace any employee or subcontractor without affecting stated timelines, deliverables, or service levels.

Target Solutions shall coordinate implementation activities included under the various sections of the Scope of Work to assure efficient and orderly implementation of the Project.

Target Solutions shall have sole responsibility to coordinate Target Solutions' work to meet Project requirements and to notify the COSA of all conflicts that cannot be accommodated through proper coordination of the project.

Contract submittals shall be submitted for a minimum of one round of review and comment by the COSA. Target Solutions shall be responsible for incorporating all comments and resubmitting as directed by the COSA.

Unless noted otherwise, one (1) hardcopy and one (1) electronic copy of all documentation shall be provided.

Target Solutions shall keep accurate and detailed computerized / written records of progress on the Project during all stages and maintain frequent contacts by telephone, site visits, meetings, etc., with all parties involved in the Project.

Target Solutions will rely on the City's Project Manager to provide all information necessary for satisfactory performance of the required tasks. Target Solutions will direct all communication to, and take direction from the City's project manager. Project meetings should be scheduled on a regular basis and will serve as a means of identifying emerging issues and reporting on progress. The initial meetings may be brief, but subsequent meetings

2.2 City Responsibilities

COSA will designate in writing a Project Manager, responsible for all Target Solutions coordination activities. The City will provide a full time Project Manager and Business Analyst for this project and access to technical personnel. COSA will assign the Project Manager as primary contact and point of authorization. This single point of contact will be responsible for facilitating all communications between San Antonio and Target Solutions. The timeliness of communication and review will directly affect Target Solutions' ability to meet agreed upon schedule deadlines. All project deliverables must be signed-off on within ten business days of notification that the deliverable is complete. The City's project manager and project team will be responsible for contributing to and reviewing Weekly Progress Reports, reporting Project Issues, and updating the Project Plan.

COSA will make available the necessary technical, business, testing and training personnel to support the deployment throughout the project. Failure to provide personnel in a timely manner, as defined in the approved Project Management Plan (deliverable milestone 1), may cause delays in delivery of the solution.

City leadership will continue to support the project with the necessary resources and commitment to transition and change that this project will entail; City will provide needed departmental liaisons and access as needed.

An appropriate work environment will be provided to Target Solutions personnel working on-site. The location should be co-located or near the locations of the work to be performed. COSA will be responsible for the scheduling of meeting rooms, training facilities, and requisite equipment. The City will provide the following in support of Target Solutions' system implementation:

1. Access to IT staff to support configuration
2. Access to staff for configuration testing
3. Review and approval of system tests
4. Assistance in scheduling staff for testing and training

COSA will be responsible for ensuring that all discovery, discussion, workshop and training sessions are attended by City personnel, as scheduled.

2.3 Project Kickoff Meeting/Discovery Working Sessions

Target Solutions will begin this project with conference call. The purpose of the call is to review responsibilities and understand Target Solutions' personnel assignments.

Authorized representatives of COSA, Target Solutions, Target Solutions' Project Manager, and other concerned parties shall each be at the meeting. All attendees shall be persons familiar with and authorized to conclude matters relating to the Project.

The output of this call is a technical memorandum that includes all of the decisions discussed during the meeting, notes protocols and coordination points, summary of the discussions, and a communications plan that outlines the structure of interactions across teams for the project.

2.4 Deliverable Ownership

The following table identifies the roles and responsibilities associated with Documentation and delivery of required deliverables services. The table attempts to define the lead role, but it is expected that both Target Solutions and the COSA will work collaboratively to develop the documentation. An "L" Lead (develop core document), "R" Review, "S" Support, or "A" Approve is placed in the column under the party that will be responsible for performing the task.

Deliverables	Vendor	City
1. Project Kick-Off – Technical Memorandum	L	A
19. . Project Acceptance and Closure	L	A
20. . Service Level Agreement	L	A
21. Special Reports	L	R

Target Solution's Project Manager and COSA Project Manager will decide together if any of these deliverables are not necessary as this is a SaaS and not an installation per se.   Those deliverables not shown (2-18) were not applicable in the SaaS implementation.

3.0 Software and Hardware

Target Solutions will, as a part of this engagement, create a unique URL for log in entry to the web-based training site. Target Solutions will define if there is a hardware/platform environment to which this web based training is not compatible.

4.0 Implementation Work

4.1   Professional Services-

Target Solutions will provide the following services:

4.1.1   Learning Management System: TargetSolutions' learning management system (LMS) makes it possible for administrators to assign and deliver online training courses and custom-made activities to their users. The system also provides the ability to track, document and report assignments.

   i.   **Enterprise:** TargetSolutions enables multiple agencies to deliver mandatory organization-wide training and track it all at the Enterprise level. They can also enable their associated sites – like the individual fire department– to customize and manage training that meets their own specific needs. With TargetSolutions, different organizations within the training group can administer their own training and compliance – but managers at the top Enterprise level can oversee training and compliance results.

   ii.   **Assignment Scheduler (Course Delivery System):** Members can schedule videos, courses and customized organizational-specific activities with our powerful Learning Management System.

iii. **Notifications:** Set up e-mail alerts specific for each employee that informs site administrators (and the employee) when expirations and deadlines approach. The platform also features a prominently displayed notification system warning users when assignments need attention.

iv. **Custom Content Delivery:** Administrators have the ability to create, assign and manage the delivery of web-based content. Administrators can deliver policies, SOPs and all other communications and ensure accountability by requiring employees to use an e-signature to verify receiving activities. Administrators are able to track completions and run reports with complete data.

v. **Reports:** Administrators can run reports on completed assignments, incomplete assignments, users, credentials, certificates, etc. They are able to save reports, recreate popular reports and specify output columns. They can also stay informed on their organization's progress toward completing courses and activities by monitoring assignment data that automatically filters onto the Dashboard. Reports can be scheduled, automated, and shared.

vi. **File Center (Organizational Resources):** Organizations can store organizational resources, including policies, new-hire documentation and any other type of file they want in a password-protected and centralized online location.

vii. **Community Resources (Resource Sharing):** Exclusive access to training videos, policies, best practices feature articles from industry experts, inspection forms and much more from other organizations across the country. Shared resources can be downloaded and delivered with ease.

viii. **Events Manager:** Site administrators can create, schedule and track organizational events (including instructor-led training events, live meetings, etc.). This tool gives site administrators the ability to track user registration for events and set e-mail notification alerts.

ix. **Bulletin Board:** Administrators can post organizational announcements for their entire organization to view on the home page of the platform.

x. **Forums:** The platform features a web-based discussion board that provides a centralized online location where an organization's administrators and users can discuss issues and trade ideas.

xi. **Organization & User Profiles (Management Tools):** Site administrators can easily manage and update their employees' levels of access to the platform.

xii. **SCORM:** TargetSolutions supports SCORM compliant courses from all sources. You can create your own content, upload it through TargetSolutions' SCORM-compatible system, and then assign to users. You can also create any type of custom activity, test, video or credential and deliver it with TargetSolutions.

4.1.2 **Records Management System:** TargetSolutions' records management system (RMS) makes it possible for administrators to track and report on all types of training assignments and activities. The powerful tools help organizations "go green," eliminate wasted paper and streamline their efforts, making managing personnel and remaining compliant more efficient.

i. **Activities Builder:** The application enables organizations to tailor training and/or activities to their organization's unique needs. Administrators can easily create any type of activity and assign it to users. Administrators can require e-signatures to verify they've received instructions.

ii. **Test Builder:** Tests are created with Test Builder and attached to activities created with the Activities Builder. Administrators can gauge employees' comprehension of material by

creating and delivering automatically graded tests. Tests can be attached to activities and assigned to users.

    iii. **Certification & Qualification Management:** Track and maintain credentials, certifications, qualifications and other types of information. Everything can be tagged with an alert or e-mail notification so it won't go unnoticed. TargetSolutions makes it easy for organizations to track online and in-person training to meet mandated requirements.

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4.1.4 **ONLINE TRAINING**: TargetSolutions' complete online training library consists of more than 1,000 courses for all types of public entities. Complete catalog of online training courses is below. Here is an overview of course titles for the Fire & EMS industry:

    i. **Fire Service:** TargetSolutions features more than 60 hours of NFPA training, including NFPA 1001 Series (Firefighter I & II), NFPA 1021 Series (Company Officer) and NFPA 1500 and 1410 Series. The catalog also offers General Firefighter Training (Wildland Firefighting, ARFF, etc.).

    ii. **EMS Continuing Education:** TargetSolutions, which is organizationally accredited by CAPCE, offers more than 160 hours of EMS recertification. The catalog also features more than 80 hours of EMS training approved by the University of Maryland, Baltimore County (UMBC) that meet the stringent requirements for the Critical Care Emergency Medical Transport Program (CCEMT-P) and covers the following categories: Preparatory; Airway; Patient Assessment; Medical; Trauma; Special Considerations; Operations.

    iii. **OSHA & Compliance:** TargetSolutions' online training catalog features over 50 OSHA safety courses that can be used to comply with state and federal training mandates.

    iv. **Human Resources:** TargetSolutions' Human Resources courses are designed to supplement the course catalog by providing training that is relevant and essential to all employees of all industries. No matter what profession an employee holds, HR training is critical for reducing liability and improving productivity.

     v.   **Motor Vehicle Safety:** TargetSolutions' driver safety training courses offer departments a convenient, easy-to-use, and time-saving solution to reduce motor vehicle losses, one of the costliest but least addressed losses in the workplace.

     vi.   **SmartTeam – Professional Development:** TargetSolutions offers more than 100 video-based, fully-narrated SmartTeam professional development training courses covering the following categories: Communication, Computer Skills, Customer Service, Finance, Health & Wellness, Leadership, Management and Sales. Courses are one-hour overviews covering professional development topics.

4.2   Integration/Migration

Integration/Migration discussion will result in a migration document deliverable, which will detail the migration of Centrelearn data into Target Solutions. An understanding of the import process for change in personnel or new personnel will be part of the training required. These personnel lists are currently stored in Telestaff.

4.3   Product Enhancements

Target Solutions will define the product offering. Target Solutions will also provide number of days of effort to modify a to-be determined number of standard reports selected from those delivered to the City as a part of the standard reporting packages.

4.4   Warranty and Security Considerations

Target Solutions provides Service Level Agreement (SLA) to COSA prior to Go-live. The SLA will be completed and signed at the earliest opportunity during the project.

Target Solutions provides access to technical experts for as long as the software is licensed. Target Solutions' Customer Support team provides support beginning with go live.

4.5   Client Services

TargetSolutions exists to deliver engaging online training courses, powerful records management applications, and world-class customer service.

4.5.1   **Platform Training:** TargetSolutions representatives will give you comprehensive instructions to teach you the platform's nuances.

4.5.2   **Implementation:** Our experienced implementation team will work to ensure the platform is configured properly to support your organization's needs.

4.5.3   **Online Help System:** We provide an extensive web-based Help System with detailed instructions and video tutorials for each operational activity on the platform.

4.5.4   **24/7 Support:** Our team is available to answer questions during normal business hours. After-hours emergency support is also available.

4.5.5   **Live Chat Feature:** The Help System includes an interactive chat feature in which you can quickly and easily communicate with a TargetSolutions representative.

4.5.6   **Renewal Support:** Your dedicated Account Manager will support you throughout your organization's contract and will also assist during the renewal process.

5.0 Project Assumptions/Risks

To identify and estimate the required tasks and timing for the project, certain assumptions and premises were made. Based on the current knowledge of the project, the project assumptions are listed below. If an assumption is invalidated at a later date, the activities and estimates will be adjusted accordingly:

1. Target Solutions assumes the City will have the proper resources to implement the software.
2. Target Solutions assumes all requirements and functionality were accurately portrayed in the City RFP and Target Solutions RFP response.
3. Target Solutions assumes all costs and work have been identified in this SOW and Requirement Traceability Matrix (RTM). Any additional cost or work required for this project will be identified and requested through a Change Request process.
4. All equipment needed to run the software is identified or known to be available at the City at this time.
5. Target Solutions assumes the City will provide the appropriate staff to be trained on the software during the training periods outlined in the Project timeline.

Project risks are characteristics, circumstances, or features of the project environment that may have an adverse effect on the project or the quality of its deliverables.
1. The import process may not be feasible.
2. The reports needed may need to be created.

6.0 Payment Milestones

TargetSolutions will provide this service to the City of San Antonio on a fixed fee with deliverables based payments. The projected cost of this project is $365,935 for the first three year term. Each additional year will be budgeted at $131,645 for licensing of 1750 users, including an annual maintenance fee of $395 per year. City of San Antonio will be billed on the invoice schedule below.

SAFD has a current Centrelearn/TargetSolutions contract in place for the May 2018-May 2019 year for the continuing education with an issued PO for $58,276. This TargetSolutions contract will have an annual invoice renewal date of November 1. Due to this overlap in contract payments, TargetSolutions has agreed to credit the remaining six months of this contract from the first year of this new contract.

Description	# Licenses	Payment	Total
Annual Payment	1750	$75/per user	$131, 250.00
Annual M&S	1	$395	$395.00
Credit for Nov 2018-May 2019	1		-$29,000
Est. Annual Total			$102,645.00

7.0 Recurring Cost

The following years of the contract will be invoice annual on November 1 as the following

Description	# Licenses	Payment	Total
Annual Payment	1750	$75/per	$131,250.00
Annual M&S	1	$395	$395.00
Est. Annual Total			$131,645.00

In September of each year, the total number of Active users will be counted to determine the actual number of licenses per year. This is due to attrition.