

CITY OF NEW ORLEANS

HELENA MORENO
MAYOR

JONATHAN WISBEY
CHIEF INNOVATION OFFICER

6/30/2026

Aisha Collier
Clerk of Council
City Hall – Room 1E04
1300 Perdido Street
New Orleans, LA 70112

Re: Proposed Agreement with OpenGov, Inc.

Madame Clerk,

Pursuant to Rule 57, please find attached a proposed agreement between the City of New Orleans and OpenGov, Inc. and a completed contract summary form.

Respectfully submitted,

Jonathan Wisbey
Chief Innovation Officer
Office of Information Technology and Innovation
Jonathan.Wisbey@nola.gov

cc: Justyn Hawkins, City Council Chief of Staff
Ashley Becnel, City Council Executive Counsel
Liz Brusseau, Deputy Director for City Council Relations



AMENDMENT NO. 2 TO THE MASTER SERVICES AGREEMENT

BETWEEN

THE CITY OF NEW ORLEANS

AND

OPENGOV, INC.

ASSET MANAGEMENT SYSTEM

THIS SECOND AMENDMENT (the “**Amendment**”) is entered into by and between the City of New Orleans, represented by Helena Moreno, Mayor (the “**City**”), and OpenGov, Inc. represented by Sam Kramer, Chief Financial Officer (the “**Contractor**”). The City and Contractor are sometimes each referred to as the “**Party**,” and collectively, as the “**Parties**.” The Amendment is effective as of the date of execution by the City (the “**Effective Date**”).

RECITALS

WHEREAS, the City and Contractor are parties to a master services agreement dated effective June 27, 2024 (the “**Agreement**”, contract K24-371) for the Contractor to provide professional services including provision and implementation of an enterprise asset management system to automate the tracking and processing of infrastructure and capital assets;

WHEREAS, effective December 17, 2025, the City and Contractor entered into an amendment to the Agreement to extend the term of the Agreement and increase compensation for basic services (“**First Amendment**”, contract K25-966); and

WHEREAS, the City and Contractor, each having the authority to do so, desire to further amend the agreement to increase compensation and reaffirm certain provisions.

NOW THEREFORE, for good and valuable consideration, the City and Contractor amend the Agreement as follows:

A. FEES ADDED BY THIS AMENDMENT. In accordance with Article IV of the Agreement, the City will pay Contractor an additional \$2,420,566.66 in compensation for services as specified in Exhibit A of this amendment.

B. MAXIMUM AMOUNT. The maximum aggregate amount payable by the City for all services performed under this Agreement is not to exceed **\$4,274,576.66**. This amount is inclusive of all services and cannot be increased except by a validly executed amendment, and if the City’s Department of Finance has certified the availability of additional funding. The City’s obligation to compensate the Contractor under this Agreement will not exceed the maximum aggregate amount payable at any time.

C. EXTENSION. The term of the Agreement is extended for twenty-five (25) additional months from June 27, 2027, to July 31, 2029.

D. CONTRACTOR’S OBLIGATIONS. The Contractor’s obligations are modified to add the services set forth in the Scope of Work designated as Exhibit B.

E. CONVICTED FELON STATEMENT. Contractor swears that it complies with City Code Section § 2-8(c). No Contractor principal, member, or officer has, within the preceding five years, been convicted of, or pled guilty to, a felony under state or federal statutes for embezzlement, theft of public funds, bribery, or falsification or destruction of public records.

F. NON-SOLICITATION STATEMENT. Contractor swears that it has not employed or retained any company or person, other than a bona fide employee working solely for it, to solicit or secure this Amendment. Contractor has not paid or agreed to pay any person, other than a bona fide employee working for it, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from this Amendment.

G. ELECTRONIC SIGNATURE AND DELIVERY. The Parties agree that a manually signed copy of this Amendment and any other document(s) attached to this Amendment delivered by facsimile, email, or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original signed copy of this Amendment. No legally binding obligation shall be created with respect to a Party until such Party has delivered or caused to be delivered a manually signed copy of this Amendment.

H. PRIOR TERMS BINDING. Except as otherwise provided by this Amendment, the terms and conditions of the Agreement remain in full force and effect.

[SIGNATURES CONTAINED ON THE FOLLOWING PAGE]

[The remainder of this page is intentionally left blank.]

IN WITNESS WHEREOF, the City and Contractor, through their duly authorized representatives, execute this Amendment.

CITY OF NEW ORLEANS

BY: _____
HELENA MORENO, MAYOR

Executed on this _____ of _____, 2025.

FORM AND LEGALITY APPROVED:

Law Department

By: _____

Printed Name: _____

CITY OF NEW ORLEANS, CITY COUNCIL

BY: _____
CITY COUNCIL PRESIDENT

OPENGOV, INC.

BY: _____
SAM KRAMER, CHIEF FINANCIAL OFFICER

30-0717374 _____
CORPORATE TAX I.D. NO.

Exhibit A: Order Form(s)



OpenGov Inc.
660 3rd Street, Suite 100
San Francisco, CA 94107
United States

Order Form Number: Q-16096.1a
Created On: 04/10/2026
Order Form Expiration: 07/31/2026
Subscription Start Date: 08/01/2026
Subscription End Date: 07/31/2027

Prepared By: Megan Morrison
Email: mmorrison@opengov.com
Contract Term: 12 Months

Customer Information:

Customer: City of New Orleans, LA
Bill To/Ship To: 1300 Perdido Street
New Orleans, Louisiana
70112
United States
Contact Name: Dave Cartwright
Email: david.cartwright@nola.gov
Phone: 504-658-1050

Order Details:

Billing Frequency: Prepaid
Payment Terms: Net 30 Days

SOFTWARE SERVICES:

Product Name	Start Date	End Date	Annual Fee
OpenGov 311	08/01/2026	07/31/2027	\$84,287.70

PROFESSIONAL SERVICES:

Product Name	Start Date	Description	Fee
Professional Services Deployment - Prepaid	08/01/2026	Custom Deployment from OpenGov Professional Services team. Scope-dependent.	\$104,227.20

Professional Services Total: \$104,227.20

Customer Billing/Service Periods:

Period: 08/01/2026
Total: \$188,514.90

Order Form Legal Terms:

This Order Form, Q-16096.1a, incorporates and is made part of the Master Services Agreement between the City of New Orleans, LA and OpenGov, Inc. dated June 27, 2024, as amended ("MSA").

If Professional Services are purchased, the Statement of Work is incorporated by reference.

Fees for the Software Services and Professional Services shall be due and payable, in advance, 30 days from receipt of the invoice.

By signing this Order Form, Customer acknowledges and agrees to these Legal Terms.

City of New Orleans, LA:

Signature:

Name:

Title:

Date:

OpenGov, Inc.

Signature:

Name:

Title:

Date:



OpenGov Inc.
660 3rd Street, Suite 100
San Francisco, CA 94107
United States

Order Form Number: Q-16096.1b
Created On: 04/10/2026
Order Form Expiration: 07/31/2026
Subscription Start Date: 08/01/2026
Subscription End Date: 07/31/2029

Prepared By: Megan Morrison
Email: mmorrison@opengov.com
Contract Term: 36 Months

Customer Information:

Customer: City of New Orleans, LA
Bill To/Ship To: 1300 Perdido Street
New Orleans, Louisiana
70112
United States
Contact Name: Dave Cartwright
Email: david.cartwright@nola.gov
Phone: 504-658-1050

Order Details:

Billing Frequency: Prepaid
Payment Terms: Net 30 Days

SOFTWARE SERVICES:

Product Name	Start Date	End Date	Annual Fee
Asset Builder	08/01/2026	07/31/2027	\$14,175.00
Asset Management	08/01/2026	07/31/2027	\$307,965.00
Facilities Domain	08/01/2026	07/31/2027	\$68,722.50
Integration Toolkit	08/01/2026	07/31/2027	\$14,175.00
Parks & Recreation Domain	08/01/2026	07/31/2027	\$49,087.50
Signal Domain	08/01/2026	07/31/2027	\$39,270.00
Stormwater Domain	08/01/2026	07/31/2027	\$49,087.50

Transportation Domain	08/01/2026	07/31/2027	\$68,722.50
Walkability Domain	08/01/2026	07/31/2027	\$39,270.00
Asset Builder	08/01/2027	07/31/2028	\$14,883.75
Asset Management	08/01/2027	07/31/2028	\$323,363.25
Facilities Domain	08/01/2027	07/31/2028	\$72,158.63
Integration Toolkit	08/01/2027	07/31/2028	\$14,883.75
OpenGov 311	08/01/2027	07/31/2028	\$88,502.09
Parks & Recreation Domain	08/01/2027	07/31/2028	\$51,541.88
Signal Domain	08/01/2027	07/31/2028	\$41,233.50
Stormwater Domain	08/01/2027	07/31/2028	\$51,541.88
Transportation Domain	08/01/2027	07/31/2028	\$72,158.63
Walkability Domain	08/01/2027	07/31/2028	\$41,233.50
Asset Builder	08/01/2028	07/31/2029	\$15,627.94
Asset Management	08/01/2028	07/31/2029	\$339,531.41
Facilities Domain	08/01/2028	07/31/2029	\$75,766.56
Integration Toolkit	08/01/2028	07/31/2029	\$15,627.94
OpenGov 311	08/01/2028	07/31/2029	\$92,927.19
Parks & Recreation Domain	08/01/2028	07/31/2029	\$54,118.97
Signal Domain	08/01/2028	07/31/2029	\$43,295.18

Stormwater Domain	08/01/2028	07/31/2029	\$54,118.97
Transportation Domain	08/01/2028	07/31/2029	\$75,766.56
Walkability Domain	08/01/2028	07/31/2029	\$43,295.18

Customer Billing/Service Periods:

Period:	Total:
08/01/2026	\$650,475.00
08/01/2027	\$771,500.86
08/01/2028	\$810,075.90

Order Form Legal Terms:

This Order Form, Q-16096.1b, incorporates and is made part of the Master Services Agreement between the City of New Orleans, LA and OpenGov, Inc. dated June 27, 2024, as amended ("MSA").

Fees for the Software Services and Professional Services shall be due and payable, in advance, 30 days from receipt of the invoice.

By signing this Order Form, Customer acknowledges and agrees to these Legal Terms.

City of New Orleans, LA:

Signature:

Name:

Title:

Date:

OpenGov, Inc.

Signature:

Name:

Title:

Date:



OpenGov Inc.
 660 3rd Street, Suite 100
 San Francisco, CA 94107
 United States

Order Form Number: Q-16164
Created On: 04/15/2026
Order Form Expiration: 07/31/2026
Subscription Start Date: 08/01/2026
Subscription End Date: 07/31/2027

Prepared By: Chad Walker
Email: cjwalker@opengov.com
Contract Term: 12 Months

Customer Information:

Customer: City of New Orleans, LA **Contact Name:** Accounts Receivable
Bill To/Ship To: 1300 Perdido Street **Email:** ar@opengov.com
 New Orleans, Louisiana **Phone:** 504-658-1050
 70112
 United States

Order Details:

Billing Frequency: Prepaid
Payment Terms: Net 30 Days

SOFTWARE SERVICES:

Product Name	Start Date	End Date	Annual Fee
GeoCam App User Accounts Admin	08/01/2026	07/31/2027	\$11,000.00
GeoCam Camera Term	08/01/2026	07/31/2027	\$71,500.00
GeoCam Facility Image Processing	08/01/2026	07/31/2027	\$82,500.00
GeoCam Support Bundle	08/01/2026	07/31/2027	\$66,000.00

Customer Billing/Service Periods:

Period: 08/01/2026 **Total:** \$231,000.00

Order Form Legal Terms:

This Order Form incorporates the OpenGov Master Services Agreement ("MSA") attached here or available at <https://opengov.com/terms-of-service/master-services-agreement/>.
 The "Agreement" between OpenGov and the entity identified above ("Customer") consists of the Order Form,

MSA, and, if Professional Services are purchased, the Statement of Work.

Unless otherwise specified above, fees for the Software Services and Professional Services shall be due and payable, in advance, 30 days from receipt of the invoice.

By signing this Agreement, Customer acknowledges that it has been reviewed, and agrees to be legally bound by the Agreement. Each party's acceptance of this Agreement is conditional upon the other's acceptance of the Agreement to the exclusion of all other terms.

In addition, Customer expressly acknowledges and agrees that this Order Form is subject to, and governed by, GeoCam's Master Products and Services Agreement and GeoCam Equipment Lease Agreement ("MPSA"). The MSA and MPSA shall apply in full to any hardware, software, or services provided by GeoCam through OpenGov and shall govern Customer's use, receipt, and delivery of such services and applicable equipment. No GeoCam hardware or software will be delivered prior to Customer's acceptance of and compliance with such GeoCam terms. This Order Form replaces and supersedes the Order Form Number Q-10040 executed on December 17, 2025.

City of New Orleans, LA:

OpenGov, Inc.

Signature:

Signature:

Name:

Name:

Title:

Title:

Date:

Date:

Exhibit B



Statement of Work

City of New Orleans, LA

Creation Date: 6/25/2026
SoW Expiration Date: 9/25/2026
Document Number: PS-11290.3
Created by: Erin Kehoe

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OpenGov Statement of Work

1. Project Scope and Understanding

This Statement of Work (“SOW”) outlines the Professional Services OpenGov will provide to City of New Orleans, LA (“Customer”) under the applicable Order Form. Professional Services or technical requirements not listed in this SOW are out of scope.

2. Exhibits

The following exhibits are incorporated by reference and are part of this SOW:

- 2.1. Exhibit 1: Implementation Activities
 - 2.1.1. Government App Builder - 311 Request Management
- 2.2. Exhibit 2: Technical Requirements
 - 2.2.1. Government App Builder

3. OpenGov Responsibilities

OpenGov will provide a framework for planning, communication, progress tracking, and coordination for activities in Exhibit 1. In collaboration with Customer, OpenGov will develop and maintain the Project Plan. The “Project Plan” is a detailed, living document that defines how the project will be executed, including tasks, timelines, milestones, and team assignments. OpenGov will monitor progress against the Project Plan, coordinate adjustments to tasks and schedules as needed, and conduct status meetings as agreed to by the parties. OpenGov will provide weekly status reports, a Project Charter, and a RAID register (Risks, Actions, Issues, and Decisions). The “Project Charter” is a high-level document outlining the project’s purpose, goals, key stakeholders, success criteria, and major milestones.

4. Customer Responsibilities

The Customer will appoint a primary point of contact with authority to make binding decisions (“Customer’s Project Manager”). This person will coordinate internal resources, assign subject matter experts (“SMEs”), and oversee implementation. Responsibilities include attending status meetings, making timely decisions, providing requested information, escalating issues internally, and collaborating on the Project Plan and Change Order process, if applicable.

Customer acknowledges that the success of this project is contingent on its full participation. Customer must provide data within ten (10) business days of a request, maintain consistent data formats and access throughout the project, and allocate the necessary Customer resources and time to support deliverables and meet agreed-upon timelines.

Any failure by Customer to meet its responsibilities under this SOW, unless the delay is the direct result of an OpenGov failure or delay (each, a “Customer Delay”) will

automatically suspend the affected obligations of OpenGov for the duration of the Customer Delay and for a reasonable restart period thereafter. All affected milestones, delivery dates, and service-level commitments will be extended on a day-for-day basis (or as otherwise reasonably necessary) to account for the Customer Delay, and may result in an adjustment of the fees if OpenGov incurs additional time, materials, or other costs as a result. Under no circumstances will any consequence of a Customer Delay constitute a breach by OpenGov of this SOW or of the Agreement, nor will OpenGov be liable for any failure to meet a performance obligation that is caused, in whole or in part, by a Customer Delay.

5. Project Delivery

OpenGov will perform services under this SOW remotely. OpenGov may use a combination of OpenGov personnel and OpenGov-trained implementation partners to deliver the services described in this SOW. OpenGov implementation partners must abide by the terms and conditions of this Statement of Work between OpenGov and the City of New Orleans.

6. Estimated Schedule

The specific timeline, including order of delivery of the product(s), will be determined during the project planning activities in the Initiate Phase. Services are estimated to begin within two (2) weeks and no later than four (4) weeks from contract signature. OpenGov reserves the right to adjust the schedule based on the availability of Customer or OpenGov resources, and the timeliness of deliverables provided by the Customer.

7. Acceptance Procedure

OpenGov will submit completed deliverables to the Customer's Project Manager for review. Within five (5) business days of receipt, the Customer's Project Manager will either provide written acceptance or a list of requested revisions. In the event there are requested revisions, the subsequent review period for acceptance will follow the same timeline until final acceptance. If Customer does not respond within this period, the deliverable will be deemed accepted. Once a deliverable is accepted, any requested changes will require a paid Change Order.

Acceptance milestones and review timelines will be tracked in the Project Plan. Both parties acknowledge that delays in task completion or unresolved issues may impact the project timeline. If OpenGov determines in good faith that Customer is not fulfilling its responsibilities under this SOW, OpenGov may place services on hold following a minimum of five (5) business days' written notice. The notice will identify the actions needed to progress the project. During the hold period, OpenGov may reallocate resources without penalty and will not be responsible for resulting delays. If the City proposes good faith remedies to the identified concerns within the allotted timeframe, OpenGov shall not place its services on hold.

8. Modifications

The fees and estimated timeline are based on the scope and assumptions in this SOW. If either party determines that a change to the scope is necessary, the parties will collaborate to define the required modification, which may result in fee adjustments based on OpenGov’s standard rates. All modifications must be documented in a written Change Order and signed by both parties (“Change Order”). Examples of changes include revisions to the project timeline, deliverables, or resource allocation.

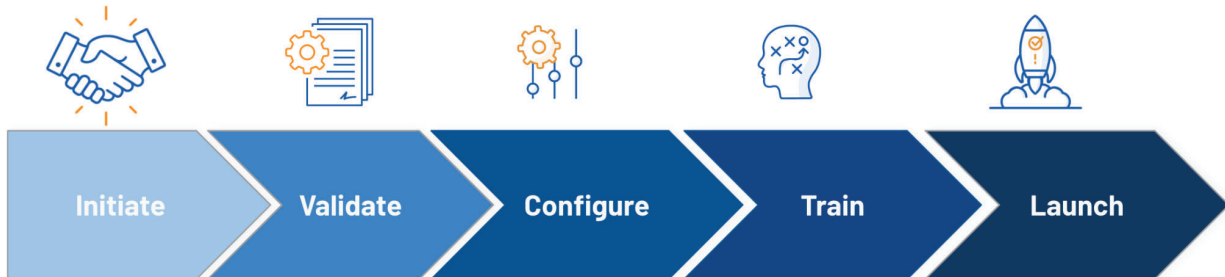
When changes to scope are required following project initiation, both parties will work in good faith to attempt to address changes without impacts to project schedule or cost. Any changes to project cost or schedule must be approved in writing by a senior official of OpenGov and the City of New Orleans.

9. Communication and Escalation Procedure

OpenGov and Customer agree to maintain regular communication in alignment with the Project Plan to ensure progress, resolve questions promptly, and minimize risk. Both parties will raise any issues or concerns in a timely manner. If challenges are not resolved through standard project discussions, Customer and OpenGov Project Managers will escalate to their respective executive leadership teams to jointly determine a resolution and align on a path to successful implementation.

Exhibit 1: Implementation Activities

OpenGov Implementation Methodology Overview



Every OpenGov implementation follows a five-phase hybrid methodology designed to ensure a structured and collaborative deployment. The phases are:

1. Initiate – OpenGov provisions access and performs initial system setup.
2. Validate – OpenGov works with the Customer to confirm requirements and review initial configurations.
3. Configure – OpenGov completes system configuration as outlined in this SOW.
4. Train – OpenGov provides training to system administrators and/or end users, as applicable.
5. Launch – OpenGov provides post-go-live support and transitions the Customer to OpenGov’s Customer Success Team.

Each implementation is structured around these phases. Deliverables, sign-offs, and completion criteria are aligned to the relevant phase.

311 Request Management

Initiate

OpenGov will:

- Conduct a project kickoff to align goals, roles, scope, and approach.
- Provision Government App Builder environment; configure initial roles
- Run discovery/working sessions to confirm high-level requirements across channels (web, and mobile-browser).
- Create initial configuration backlog in shared workspace

Customer will:

- Identify stakeholders; ensure attendance at kickoff and working sessions.
- Confirm environment access and user roles.
- Provide process documentation (current service catalog, scripts, categories), reporting examples, and regulatory/retention requirements.
- Review and approve initial configuration backlog and project schedule.

Assumptions:

- OpenGov will use standard templates and intake patterns unless otherwise agreed in writing. Standard templates and intake patterns will be made available to customer in advance for review and feedback.
- Branding and content style guides provided by Customer (if applicable)

Completion Criteria:

- Kickoff completed with documented actions.
- Access confirmed for core users.
- Initial backlog and plan approved.
- Shared workspace established.

Validate

OpenGov will:

- Facilitate validation workshop to confirm requirements, dependencies, and acceptance criteria across intake channels, routing rules, SLAs, and reporting.
- Present refined backlog, timeline, and resource plan for sign-off.
- Validate user access, permissions, and environment readiness.
- Update artifacts based on feedback prior to configuration.

Customer will:

- Attend validation with decision-makers and SMEs (call center, departmental responders, IT/GIS).
- Confirm access to needed systems and tools (GIS, work order/asset mgmt, ERP/finance, SSO, legacy data).
- Review and sign off on backlog and plan.
- Resolve internal dependencies that could block configuration.

Assumptions:

- Any additional requirements identified will be assessed for scope and schedule impact.

Completion Criteria:

- Customer sign-off on plan and backlog.
- Access validated.
- No outstanding blockers to start Configure.
- Readiness checkpoint logged in project documentation.

Configure

Service Catalog

OpenGov will:

- Define catalog taxonomy and metadata; configure categories, subcategories, and article templates
- Provide enablement on ongoing content governance.

Customer will:

- Supply existing catalog lists and knowledge content; designate content owners
- Review layouts and content structure; approve final catalog and initial article set.

Assumptions:

- Content writing and localization are Customer responsibilities unless otherwise contracted.
- External website CMS updates (outside of the 311 portal) are out of scope.

Completion Criteria:

- Service catalog configured and linked to intake workflows.
- Initial knowledge base articles published.
- Governance approach documented.

Service Request Intake & Form (Web & Browser Accessible Mobile)

OpenGov will:

- Configure up to thirty-two (32) service request types.
- Request types must follow a common template structure and share substantially similar fields, logic, routing, and layout patterns.
- Request types that materially differ in workflow, data structure, routing logic, or integration behavior may be considered out of scope subject to change order.
- Support request types spanning no more than seventeen (17) distinct departments.
- Configure:
 - Standard Fields (text, dropdown, multi-select, date, etc.)
 - Required/optional field validation
 - Conditional visibility logic (limited to standard platform capabilities)
 - File attachments (standard limits apply)
 - Standard layouts using existing form components
- Configure Internal (non-public) request types within the same thirty-two (32) request total.
 - No additional request type allotment is provided for internal-only forms.
 - Internal forms must follow the same structural guardrails as public forms.
- Implement address capture and geocoding using standard OpenGov capabilities and/or existing GIS integrations where in scope.
- Geofencing will follow one of the following supported models:
 - A single global geofence applied across all requests types, or
 - Department-level geofencing applied consistently across all request types within that department.
- Unique geofencing per individual request type is limited and must remain within standard configuration capabilities.
 - Complex geospatial logic, custom map layers, new GIS data creation, or advanced spatial analysis is out of scope unless otherwise specified.
- **Anonymous Portal:**
 - OpenGov will configure an anonymous submission experience using a service account for intake processing.

- reCAPTCHA or equivalent bot-prevention controls.
- Anonymous Submissions:
 - Must use the same configured public request types (no additional forms created for anonymous intake)
 - Cannot be used for internal-only request types.
 - Will not support follow-up requests for additional information.
 - Cannot be converted to registered-user submission after submission.
 - May be rejected or routed to EAM for work order consideration where applicable.
- Two-way communication, anonymous status tracking beyond standard confirmation messaging, or anonymous-to-registered account conversion is out of scope unless explicitly stated.
- **Constituent Dashboard:**
 - Configuration will leverage existing template-based constituent dashboards using standard platform components.
 - OpenGov will provide advisory guidance on accessibility and user experience best practices.
 - Custom UI development, custom front-end coding, or standalone website development is not included
- External resources or websites may be added as buttons or tiles that function as standard hyperlinks redirecting users to publicly available URLs. Embedding external systems or custom integrations is out of scope unless otherwise specified.
- Conduct review sessions and iterate to finalize.

Customer will:

- Provide field-level requirements, current scripts, categories, and mandatory data elements.
- Participate in reviews; provide consolidated feedback.
- Validate permissions, logic, and layouts for internal and resident users
- Approve final configurations.

Assumptions:

- Designs leverage standard form capabilities and controls
- Public site branding assets provided by Customer.

Completion Criteria:

- Forms/tables configured and tested
- Address capture/geocoding validated (if in scope).
- Required data capture confirmed
- Customer approval received.

Mobile Application (iOS & Android)

Mobile Access (iOS & Android)

- OpenGov will provide a mobile application experience for iOS and Android devices designed to support constituent-facing 311/CRM request submission and status visibility.

Scope of Mobile Functionality:

- The mobile application will support core constituent workflows, including:
 - Submission of service requests using configured public request types
 - Address/location capture (subject to device capabilities and configured GIS services)
 - Photo/file attachments (subject to standard platform limits)
 - Viewing request status updates (where applicable)
 - Standard confirmation and notification behavior
- The mobile experience will leverage the same configured public request types as defined in the Service Request Intake & Form section.

Functional Boundaries:

- The mobile application is designed primarily for constituent request intake and status viewing.
- Administrative configuration, workflow management, reporting, advanced triage, SLA management, and internal processing features are supported through the web application only unless otherwise specified.
- Feature parity between mobile and web applications is not assumed.
- Advanced UI customization, custom mobile workflows, or device-specific enhancements beyond standard capabilities are out of scope unless explicitly stated.

Assumptions:

- The mobile application will use standard platform components and supported device capabilities.
- Submission performance and certain functionality may vary based on device type, operating system version, connectivity, and permissions granted by the end user.
- Publication to Apple App Store and Google Play will follow standard platform release processes and approval timelines.

Completion Criteria:

- Mobile application available for iOS and Android distribution.
- Core request submission functionality tested and validated.
- Customer approval received.

Workflow, Triage & Routing

OpenGov will:

- Configure routing rules, ownership groups, task states, reassignment, and collaboration steps.

- Configure workflow states for up to thirty-two (32) service requests types using a shared workflow framework.
- Establish routing rules based on:
 - Request Type
 - Department
 - Standard priority level
 - Location (if applicable)
- Configure department-level ownership groups and queues aligned to the defined (less than or equal to seventeen (17)), including:
 - A primary queue per department (additional sub-queues or specialty are out of scope unless explicitly stated).
 - Queue visibility based on assigned department role.
- Configure standard task states using a standardized lifecycle (e.g., Submitted, In Progress, On Hold, Closed, Completed), including an optional standardized RFI (Request for Information) pattern where supported.
 - Department-specific workflow/state variants must remain minimal and within standard configuration capabilities.
 - Complex, highly branched workflows or materially different state model per department/request type may require change order.
- Document agreed workflows at a high level and conduct structured testing sessions.
- **Queue Assignment Model**
 - Assignments will occur at the **department queue level only**.
 - Only one (1) queue per department is included in scope.
 - Automatic assignment to specific individuals is out of scope.
 - Load balancing, workload distribution logic, skill-based routing, or availability-based assignment is not included.
 - Vacation rules, backup assignments, and dynamic reassignment automation are not included.
 - Escalation routing beyond initial department-level assignment is not included unless otherwise specified in the approved project plan.

Customer will:

- Define departmental ownership of groups (less than or equal to 10 departments).
- Identify users assigned to each departmental group queue (limited to scope role counts).
- Provide current process maps, ownership matrices, and escalation criteria for configuration.
- Participate in testing and provide consolidated feedback; approval final logic in writing.
- Resolve GIS boundary questions, including conflicts/overlaps in service areas, if location-based routing is required.

Assumptions:

- Routing an assignment will be department-based, not user-based.
- No custom assignment logic will be developed.
- Workflow states will be standardized across departments wherever possible.

- Automation will use standard workflow options; custom code is out of scope unless listed.
- Location-based routing requires GIS layers and data provided by Customer.
- Refinement is limited to up to two (2) rounds of consolidated changes following workflow review sessions. Additional iterations may require a change order.

Completion Criteria:

- Workflows live with routing functioning.
- Ownership groups and queues configured.
- Approval received from Customer.

SLAs, Notifications & Escalation

OpenGov will:

- Configure SLA tracking using standard OpenGov 311/CRM capabilities, including SLA timers for:
 - Acknowledgement
 - First Response
 - Resolution
- Configure standard SLA indicators and monitoring views/dashboards available within the platform.
- Configure resident notifications and status updates using standard communication capabilities:
 - Email and/or SMS (when in scope and when Customer provides required communication templates)
- Configure escalations to supervisors and leadership.
- SLA configuration is limited to up to three (3) SLA policies across all request types unless otherwise specified.
 - An "SLA Policy" is defined as a single set of thresholds and calendar rules that may apply to multiple request types/departments.
- Escalations do not include automatic reassignment, rerouting to additional queues, or dynamic workload redistribution.
- Notifications are limited to standard event-based updates (e.g., submission received, status changed, closed) using standard template capabilities. Custom notification logic beyond standard triggers may require a change order.

Customer will:

- Provide SLA definitions per category and business hours/holiday calendars. (policy name, threshold values, and applicability by request type/department)
- Approve notification templates and escalation paths.
- Validate end-to-end SLA behavior.

Assumptions:

- SMS/email providers and associated fees are Customer responsibilities unless otherwise contracted.
- Two-way messaging outside of standard capabilities may require a Change Order.

Completion Criteria:

- *SLAs operational with monitoring in dashboards
- Notifications and escalations tested
- Customer approval received.

Integration with OpenGov Enterprise Asset Management (EAM)

OpenGov will:

- Configure an integration between OpenGov 311/Constituent Request Management (CRM) and OpenGov EAM using standard, supported capabilities so that:
 - Eligible 311 requests may create 311 requests, which will enable users to issue work orders, and
 - EAM work order status updates may be reflected back in 311 (including the public status page where applicable).
- Define decision rules for work-order creation (e.g., by category/high-alert flag).
- Configure field mapping between 311/CRM and EAM for a standard integration set, including (as applicable):
 - 311 Request ID / External Reference
 - Request Type
 - Location/Address
 - Requester(or)
 - Description/Comments
 - File Attachment(s)
- Configure status mapping for resident-facing visibility (e.g., translating EAM internal statuses into simplified public statuses) using standard platform capabilities.
- Implement standard API-based integration or agreed method; handle error validation and retries.
- Configure read-backs of EAM status/progress for resident-friendly display on the status page.
- Provide technical runbook and data-mapping documentation.
- Integration is limited to one (1) EAM request type creation pathway per eligible request type.
- Field mapping is limited to twenty (20) mapped fields, or the limit already configured in EAM, unless otherwise specified.
- The integration does not support:
 - Custom middleware, custom EAM extensions, or non-standard API capabilities.
- Advanced exception handling (custom alerting workflows, automated replay tooling, or custom integration dashboards) is out of scope unless explicitly stated.

Customer Responsibilities:

- Provide or confirm EAM environment details, credentials, and test data; confirm asset/address cross-walks.
- Validate mapping, status cross-reference, and acceptance criteria.
- Coordinate with any internal EAM administrators for endpoint access/windows.

Boundaries & Assumptions

- Scope is limited to OpenGov 311 Request Management ↔ OpenGov EAM integration; other third-party systems are out of scope.
- Integration follows standard, supported API capabilities; custom EAM extensions are excluded.
- Delays in access, credentials, or test data availability may impact delivery timeline.

Completion Criteria:

- End-to-end tests demonstrate work-order creation and status synchronization; integration documentation delivered; stakeholder approval received.

Reporting & Dashboards

OpenGov will:

- Configure reports (up to 10), filters, and visualizations; enable exports suitable for council/board/public dashboards (up to 6 unique dashboards)
- Provide enablement on managing report parameters and publishing.
- Ensure that data can be extracted via API or automation for inclusion in PowerBI or other dashboards.

Customer will:

- Define KPIs and reporting needs; provide examples of internal and public reporting.
- Review layouts and logic; test exports; designate owners for ongoing reporting.

Assumptions:

- Reports rely on data available in configured tables or approved imports/integrations.
- Complex, custom templates outside of standard exports may require a Change Order.

Completion Criteria:

- Reports and dashboards live with accurate data.
- Permissions verified; export formats tested
- Customer approval received.

Train

Administrator & Dispatcher Training

OpenGov will:

- Deliver live virtual training; provide documentation and recordings.
- Cover core admin tasks (form edits, report creation, workflow adjustments, SLA configuration, permission controls).
- Assign practice scenarios.

Customer will:

- Identify admin/dispatcher users; attend training; complete practice exercises; confirm understanding of responsibilities.

Assumptions:

- Training delivered remotely unless otherwise specified.
- Attendees are available at scheduled times.

Completion Criteria:

- Admin training completed; access confirmed for relevant users.
- Practice scenarios validated
- Customer confirms readiness to manage configuration post-launch.

Agent/Field Staff Enablement

OpenGov will:

- Deliver role-based sessions and quick-reference guides.
- Demonstrate status updates, assignment, and completion workflows.

Customer will:

- Ensure attendance; provide device policies and any mobile restrictions.
- Validate that training aligns to field operation needs.

Assumptions:

- Device procurement and management are Customer responsibilities.
- Offline mode support is limited to generally available capabilities.

Completion Criteria:

- Agent/field sessions delivered; materials distributed.
- Readiness sign-off received from departmental leads.

Public/User-Facing Collateral

OpenGov will:

- Draft how-to guides with screenshots and FAQs; deliver PDF and web-optimized formats.
- Review drafts with Customer for accuracy; finalize collateral.

Customer will:

- Review and provide feedback; approve final content; handle distribution and any localization.

Assumptions:

- Content reflects current forms and processes at go-live.
- Accessibility/translation needs identified by Customer.

Completion Criteria:

- Guides finalized and approved; published via Customer channels.

Launch

OpenGov will:

- Monitor adoption; resolve configuration questions and issues.
- Conduct final stakeholder review; transition to Customer Success.

Customer will:

- Monitor usage; report issues; attend final review; sign solution acceptance.

Assumptions:

- Hypercare support is time-boxed per the Project Plan.
- Post-launch enhancements will be prioritized via Customer Success or Change Orders.

Completion Criteria:

- Hypercare window closed; known issues addressed or queued.
- Stakeholder review completed; solution acceptance signed.

Exhibit 2: Technical Requirements

Government App Builder Technical Requirements

- Migration
 - All data must be accessible to OpenGov in Excel or CSV format
 - Maximum historical record count: 500
- Flat File Integrations
 - Customer must
 - Provide OpenGov with the export file (a delimited file) from the external system
 - Automate the export and/or import of data into and out of the external system.
- API Integrations
 - Customer is responsible for:
 - Fees associated with purchasing the external system
 - Providing OpenGov with access to the API and/or access to technical staff from that vendor.
 - Access to a test instance of the third party API including a URL, authentication credentials, and relevant documentation.
 - Changes to scope resulting from a change in the third-party vendor's API.
 - Testing expected workflows and data in both test and production environments
 - To display a location on a map, the third party system must be able to provide location data via their API, as shapes or coordinates. Text addresses are limited to populating address fields.



**CONTRACT SUMMARY
TO ACCOMPANY REQUESTS FOR CONTRACT APPROVAL
BEFORE SUBMISSION TO CLERK OF COUNCIL**

Requesting Department or Agency: _____

Name of Contact Person: _____

Telephone Number: _____

Email Address: _____

Initials of Sponsoring Councilmember(s): _____

PROVIDE THE FOLLOWING CONTRACT DETAILS

1. **The purpose and need for the contract:** _____

2. **The parties involved:** _____

3. **The obligations, expectations, and deliverables of the parties involved:** _____

4. **The duration of the contract:** _____

5. **The cost and any fiscal implications of the contract for the City:** _____

6. **Describe disadvantaged business enterprise (DBE) participation:** _____
