

WORK AUTHORIZATION FOR AGREEMENT BETWEEN BROWARD COUNTY AND THE IQ BUSINESS GROUP, INC. FOR COUNTYWIDE CONSULTING SERVICES FOR ENTERPRISE CONTENT MANAGEMENT NEEDS ASSESSMENT (RFP# TEC2122283P1)

Contract Number: TEC2122283P1
Work Authorization No. 003

This Work Authorization is between Broward County and The IQ Business Group, Inc. (“Contractor”) pursuant to the Agreement for Countywide Consulting Services for Enterprise Content Management Needs Assessment, executed on January 5, 2022. In the event of any inconsistency between this Work Authorization and the Agreement, the provisions of the Agreement shall govern and control.

Services to be provided:

Contractor will provide consulting to assist the County with the Enterprise Content Management (ECM) Request for Letters of Interest (RLI) solicitation and procurement process, and project management services for oversight and guidance during year 1 of the ECM installation, implementation, and configuration as further described in Exhibit A – Statement of Work (SOW).

The amount permitted under the Agreement for Optional Services is \$930,000.

The time period for this Work Authorization will be from the date of complete execution until twenty-four (24) months from the County’s Notice to Proceed for the Services to be provided under this Work Authorization unless otherwise extended or terminated by the Contract Administrator.

Fee Determination: Costs to County for services under this Work Authorization shall not exceed the following amount:

Professional Services	\$543,500
Total Not-to-Exceed Cost of this Work Authorization	\$543,500

Contractor shall provide services towards the Phase 1 and 2 Tasks/Deliverables listed in Table 1 below. All services provided under this Work Authorization (“WA”), whether for in-progress work or for completed deliverables, will be billed by Contractor monthly based on actual hours worked, based on the hourly rates stated in Table 2 below, against defined deliverables and limited to the identified Not-to-Exceed cost stated above. Contractor will track and report all hours worked against defined deliverables and will share with County interim versions and/or other evidence of progress against deliverables for the services provided. Contractor will invoice the County upon written acceptance by the County verifying that the County is satisfied with the progress being made toward deliverables. Each invoice will detail the number of hours worked, including a description of tasks performed towards the progress of or completion of the Phase 1 and 2 Tasks/Deliverables, as applicable, and the applicable hourly rates for each resource.

Table 1. Contractor's PM Tasks/Deliverables and Estimated Hours for Phases 1 and Phase 2

Tasks/Deliverables and Estimated Costs for Phases 1 and 2	
Description	Amount
Pre-Solicitation Strategy Meeting	\$3,700
Solicitation and Advertisement and Vendor Proposal Review	\$83,200
Demonstration and Evaluation Meeting	\$17,360
Assistance with selected Vendor contract negotiations	\$17,360
Total Estimated Cost for Phase 1	\$109,300
Project Planning and Analysis	\$284,760
Project Planning and Architectural Review	\$11,760
Oversight and guidance with the ECM installation and configuration of the Core ECM solution	\$8,400
Oversight and guidance with the Implementation of ECM functionality for two selected Agencies	\$129,280
Total Estimated Cost for Phase 2	\$434,200
Total Not-To-Exceed Cost of this Work Authorization	\$543,500

Table 2. Hourly Rates by Consulting Role per contract

Consulting Title/Role	Hourly Rate
Expert Advisor (Quality Assurance, ECM Records Management, Information Governance)	\$250
ECM Project Manager	\$210
Senior ECM Technical Architect	\$210
Senior ECM Consultant	\$190
ECM Consultant (ECM and Digitization)	\$175
ECM Analyst and Developer	\$160

IN WITNESS WHEREOF, the Parties hereto have made and executed this Work Authorization, effective as of the date the last party signs this Work Authorization.

COUNTY

ATTEST:


BROWARD COUNTY, by and through
its Board of County Commissioners

By: _____
Broward County Administrator, as
ex officio Clerk of the Broward County
Board of County Commissioners

By: _____
Mayor
____ day of _____, 20__

Approved as to form by
Andrew J. Meyers
Broward County Attorney
115 South Andrews Avenue, Suite 423
Fort Lauderdale, Florida 33301
Telephone: (954) 357-7600

By Sara Cohen Digitally signed by Sara Cohen
Reason: Approved as to form
Location: Broward County
Attorney's Office
Date: 2024.10.08 14:36:41 -04'00'
Sara F. Cohen (Date)
Assistant County Attorney

By  Digitally signed by René D.
Harrod
Reason: Approved as to form
Date: 2024.10.08 14:43:05 -04'00'
René D. Harrod (Date)
Chief Deputy County Attorney

CONTRACTOR

By: Dianna Parrish
Authorized Signer

Dianne Parrish
Print Name and Title

8th day of October, 2024

Exhibit A – Statement of Work

Contractor shall provide the following work under this WA:

1. Project Request

The County is seeking a County-wide, enterprise content management (ECM) solution to provide improved management and governance of its digital and physical content. The County will issue a solicitation to advertise a Request for Letters of Interest (RLI) and intends to enter into an agreement with the successful proposer for an ECM solution.

Contractor shall provide consulting services to the County for assistance with the ECM RLI solicitation and procurement process as the County solicits and evaluates vendor proposals for an ECM solution, and Contractor shall provide project management services for oversight and guidance of the selected vendor's performance during year 1 of the initial term of the resulting agreement ("Year 1 of the RLI Agreement") for the ECM solution installation, implementation, and configuration.

2. Services Description

Contractor will provide the services outlined below in phases 1 and 2:

- Phase 1 – ECM RLI solicitation and procurement support
- Phase 2 – Project management and oversight of the ECM solution installation, implementation, and configuration during Year 1 of the RLI Agreement.

3. Technical Approach

Contractor will complete all tasks listed within Phases 1 and 2 within twelve (12) months after the date of the County's NTP for each phase respectively, unless otherwise approved in writing by the Contract Administrator. An NTP for each phase will be issued separately.

PHASE 1 - ECM RLI Solicitation and Procurement Support

Contractor will provide solicitation and procurement support to the County under the guidance and direction of the County including but not limited to:

A. Pre-Solicitation Strategy Meeting

- 1) Contractor will attend a strategy meeting with the County and applicable stakeholders for instructions regarding participation in demonstration and evaluation meetings.

B. Solicitation Advertisement and Vendor Proposal Review

- 1) Contractor will provide the County with input for responses to bidder questions received during the Questions and Answer (Q&A) period of the RLI solicitation advertisement.
- 2) Contractor will perform an initial review of all submitted proposals and provide the Enterprise Technology Services (ETS) Project Manager (PM) with a list of questions that

require clarifications from proposers. Contractor will perform necessary iterative clarifications related to the proposal as needed by the County.

- 3) Contractor will provide a written analysis of sections of the selected proposals as directed by the County including but not limited to the proposers' descriptions of project approach, submitted project plan, experience descriptions and references, and strength of proposed key team members.
- 4) Contractor will review all submitted functionality checklists and provide the ETS PM with a list of questions that require clarifications from proposers. Contractor will perform necessary iterative clarifications related to the proposal as needed by the County.
- 5) Contractor will collaborate with the ETS PM to create a functionality checklist matrix template in Microsoft Excel format that will include all information from the functionality checklists submitted by proposers to be used for the County's Technical Review Team (TRT) fact-finding report.
- 6) Contractor will collaborate with the ETS PM to review the different pricing models submitted by proposers and the total cost of ownership for proposed ECM solutions to facilitate price comparison.
- 7) Contractor will collaborate with the ETS PM to verify all vendor references.

C. Demonstration and Evaluation Meetings

- 1) Contractor will collaborate with ETS PM to develop an agenda and demonstration script to be used by TRT during the demonstration meeting.
- 2) Contractor will attend the demonstration meetings and provide a written summary of vendors based on the vendor demonstrations.
- 3) Contractor will attend the evaluation meetings virtually and assist Evaluation Committee (EC) members with responses to questions regarding the information submitted by proposers.

D. Vendor Selection and Contract Negotiations

- 1) Contractor will assist the County with vendor contract negotiations but will not actively participate in the negotiation activities.

PHASE 2 - Project Management and oversight of the ECM installation, implementation, and configuration during Year 1 of the RLI Agreement

Contractor will provide a full-time ECM project manager (PM) with experience managing enterprise scale, ECM programs and projects to oversee and guide the selected vendor's performance during Year 1 of the RLI Agreement for the ECM project scope of work and provide quality assurance for the work performed and the deliverables produced. Contractor, in consultation with the County, will assign the Contractor's PM within thirty (30) days after completion of Section D - Vendor Selection and Contract Negotiations of Phase 1 above. Contractor will assign Contractor's consultants to assist with the tasks below as needed, limited to the identified Not-to-Exceed cost. Contractor's PM will perform the following tasks as directed by County including but not limited to:

- 1) Contractor's PM will collaborate with the County to learn the County's project management framework, governance, and documentation templates and will utilize the County approved process and artifacts to perform PM activities during Year 1 of the RLI Agreement.
- 2) Contractor's PM will on behalf of the County, and under the County's direction, act as the County's PM to collaborate with the selected vendor's PM and team, and to act as a project liaison with County staff.
- 3) Contractor's PM will collaborate with the selected ECM vendor and the County to develop a Microsoft Teams project site and standard templates and methodology for reporting progress, status, issues, short-term planned tasks, and budget reporting.
- 4) Contractor's PM will provide oversight of the planning of the ECM project, comparing project planning artifacts against the Project Management Institute's Project Management Body of Knowledge (PMI-PMBOK) standards.
- 5) Contractor's PM will collaborate with the County's PM to review and approve the detailed ECM project plan, risk register, communications plan, and change management plan.
- 6) Contractor's PM will track the vendor's performance against the project plan tasks, schedule, and budget.
- 7) Contractor's PM will collaborate with the County regarding risk management and mitigation efforts.
- 8) Contractor's PM will review status reports regarding implementation provided by the vendor and present oversight analysis to the County.
- 9) Contractor's PM will provide unbiased communications to the County executives, stakeholders, and management related to project performance, issues, risks, contingencies, etc.
- 10) Contractor will provide knowledge transfer and training to County's Project Manager(s) at the end of the first year's implementation to ensure continuity of the project implementation and a seamless transition.

A. Project Planning and Architectural Review

Contractor's PM will oversee and guide the County and the selected ECM vendor with the following tasks including but not limited to:

- 1) Contractor will provide oversight, quality assurance, and guidance of the finalization of a detailed project plan and timeline for the installation or provisioning of software and hardware infrastructure or hosting environment by the selected ECM vendor.
- 2) Contractor will provide the finalized detailed project plan and timeline for the installation of the vendor's ECM modules as proposed.
- 3) Contractor will review and approve a system schematic depicting the planned architecture for the ECM solution.
- 4) Contractor will review and approve disaster recovery approaches and methods.
- 5) Contractor will review and approve the approach for County user setup.

B. Oversight of ECM Installation and Configuration

Contractor's PM will oversee and guide the County and the selected ECM vendor with the following tasks including but not limited to:

- 1) Contractor will provide oversight, quality assurance, and guidance on the ECM installation of the development/test and production environments by the selected ECM vendor.
- 2) Contractor will review documentation provided by the selected ECM vendor related to the installed components and their technical architecture and advise County regarding same.

C. Oversight of Implementation of ECM functionality for selected Agency

During the implementation of ECM functionality for a selected County agency, Contractor's PM will oversee and guide the County and the selected vendor with the following tasks including but not limited to:

- 1) Contractor will assist with establishing and synchronization of user accounts.
- 2) Contractor will assist with implementing a centralized records schedule.
- 3) Contractor will assist with finalizing a detailed project plan for this phase of the project.
- 4) Contractor will assist with implementing taxonomies including folders, metadata, permissions, and record series mappings.
- 5) Contractor will assist with the digitization of paper records.
- 6) Contractor will assist with designing and implementing an approach for closing a Microsoft Teams site.
- 7) Contractor will assist with implementing a selected business workflow automation.
- 8) Contractor will assist with implementing a records management automated disposition approval workflow.
- 9) Contractor will assist with User Acceptance Testing.
- 10) Contractor will assist with training of County agency staff.
- 11) Contractor will assist with establishing and providing operational support.
- 12) Contractor will assist with final approval and project close-out.

4. Required Timeline

Contractor will complete the tasks listed within Phases 1 and 2 within twelve (12) months after the date of the County's NTP as outlined in Section 3 – Technical Approach unless otherwise approved in advance by the Contract Administrator. An NTP will be issued for each phase separately.

At the County's discretion, the Contract Administrator may clarify or make minor modifications to this Statement of Work, provided such changes do not constitute a material change in scope, are approved by Contractor, and do not increase costs to the County.

5. Managerial Approach

Contractor will ensure that the persons responsible for Contractor's performance of the Services under this Agreement and, to the extent applicable, identified below (collectively "Key Personnel") are appropriately trained and experienced and have adequate time and resources to perform by the terms of this Agreement. To the extent Contractor seeks or is required to make any change to the composition of the Key Personnel, Contractor will provide the County with

thirty (30) days advance written notice (or as much advance notice as is possible if thirty (30) days' notice is not possible) regarding such changes and the management plan associated with such changes. The County shall not be responsible for any additional costs associated with a change in Key Personnel.

The Key Personnel shall be as follows:

Contractor Participants:	Role	Email	Address/Phone
Chris Legnon	Phase 1 - ECM Project Manager	clegnon@iqbginc.com	512-423-4481
TBD	Phase 2 – ECM Project Manager	TBD	TBD
Chris Legnon	Expert Advisor	clegnon@iqbginc.com	512-423-4481
Jim Clements	Senior ECM Consultant	jclements@iqbginc.com	804-291-6980
Alex Webb	Senior ECM Consultant	awebb@iqbginc.com	512-923-7221

A. Meetings and Communication

Contractor will adhere to the following communication and reporting schedule unless otherwise agreed in writing by the parties.

For the duration of the WA, Contractor will conduct weekly meetings via teleconference with ETS Management to discuss relevant topics.

Project Kick-Off Meeting

Contractor’s PM shall be responsible for the following aspects of the project:

1. Contractor’s PM will coordinate and conduct weekly status calls and provide a weekly status report to the County that details the progress of tasks along with any proposed changes to the project timeline throughout the duration of the project. Any changes must be approved in writing in advance by the County’s Contract Administrator.
2. Contractor’s PM will conduct additional ad-hoc meetings with various stakeholders as requested by the County.
3. Contractor’s PM will provide weekly unbiased communications to the County executives, stakeholders, and management related to project performance, issues, risks, contingencies, etc.
4. Contractor’s PM will coordinate with the County and provide a combination of up to six (6) 3-day on-site visits, as determined by the County.
5. Contractor will be responsible for all travel costs with no reimbursable requests for payment to the County permitted.
6. Contractor’s PM will coordinate Contractor’s resources.
7. Contractor’s PM will serve as the liaison between the County and Contractor.

8. Contractor’s PM will coordinate and lead an introduction and on-site project kick-off meeting with County and the on-site project kick-off meeting will include a discussion of, at a minimum, the following topics:
- identification of Contractor personnel and their roles during installation, implementation, and support
 - identification of County personnel and their roles
 - expectations of Contractor and County during the process
 - review of project objectives
 - review of project scope details
 - Contractor’s delivery of a written project plan and timeline

6. Deliverable Products and Services

Contractor shall provide the following Deliverables, which shall be considered accepted by the County only upon written notice by the Contract Administrator that the Deliverable meets the applicable Requirements or Acceptance Criteria.

Deliverables		
Phase No.	Description	Requirements or Preliminary Acceptance Criteria
1	Provide input for responses to bidder questions received during the Q&A period	Responses to questions, as specified in Section 3 – Technical Approach.
	Provide list of questions that require clarification from proposers on proposals	List of questions that require clarifications, as specified in Section 3 – Technical Approach.
	Provide list of questions that require clarification from proposers on functionality checklist	List of questions that require clarifications, as specified in Section 3 – Technical Approach.
	Develop functionality checklist matrix template in Microsoft Excel format	Functionality Checklist matrix template in Microsoft Excel format from selected vendor proposals functionality checklists as specified in Section 3 - Technical Approach.
	Develop a written summary of vendor proposal sections	Written summary of vendor proposal sections as specified in Section 3 - Technical Approach.
	Develop agenda and demonstration script for demonstration meeting	Agenda and demonstration script as specified in Section 3 - Technical Approach.
	Develop a written comparison of demonstration review	Written comparison of demonstration review sections as specified in Section 3 - Technical Approach.
2	Conduct a project kick-off meeting	Project kick-off meeting has occurred, as specified in Section 5 – Managerial Approach.

Deliverables		
Phase No.	Description	Requirements or Preliminary Acceptance Criteria
	Develop a Microsoft Teams project site, standard templates, and methodology for reporting progress, status, issues, short-term planned tasks, and budget reporting	Microsoft Teams project site and standard templates and methodology for reporting progress as specified in Section 3 - Technical Approach.
	Provide a finalized detailed project plan for the oversight, quality assurance, and guidance of the installation of software and hardware infrastructure or hosting environment by the selected ECM vendor	Finalized detailed project plan as specified in Section 3 - Technical Approach.
	Provide a finalized detailed project plan for the oversight, quality assurance, and guidance of the core ECM installation by the selected ECM vendor	Finalized detailed project plan as specified in Section 3 - Technical Approach.
	Analyze and perform a review of vendor's status reports regarding installation, configuration, and implementation tasks	Oversight analysis as specified in Section 3 - Technical Approach.