

## STATEMENT OF WORK #2

This **STATEMENT OF WORK #2** ("**Statement of Work #2**" or "**SOW #2**") is entered into as of February 11, 2022 ("**SOW #2 Effective Date**") and references and is executed subject to and made a part of the terms and conditions of the **CONSULTING SERVICES AGREEMENT** ("**Agreement**"), dated May 25, 2021 by and between **Panorama Government Solutions, LLC** ("**Panorama**") and **Town of Apex, North Carolina** ("**Client**"), and sets forth certain mutual obligations of the parties to be performed under the terms and conditions of the Agreement and this SOW #2. Panorama and Client may be referred to in this SOW #2 individually as a "**party**" or collectively as the "**parties**". Capitalized terms that are used in this SOW #2 that are not otherwise defined have the same meaning ascribed to such terms as set forth in the Agreement.

In consideration of the foregoing, and in reliance on the mutual agreements contained herein, the parties agree as follows:

**1. SCOPE, SERVICES AND DELIVERABLES.** Subject to the terms and conditions of the Agreement and this SOW #2, including, without limitation, the payment of all applicable Fees, Panorama agrees to perform the Services and provide any Deliverables, as set forth below:

- **Description of Project – Citizen Engagement Platform (CEP) Assessment**
  - Project Phases, Activities, Tasks and Deliverables: See Appendix A.
  - Estimated Project Cost: \$103,975.00, inclusive of optional estimated organizational change management work of \$21,960.00. These estimates are for professional services only and are exclusive of travel time and expense, if incurred. Project costs shall not exceed the above referenced estimates without prior written approval from Client.
- Any additional Services and Deliverables as mutually agreed upon between Client and Panorama, as evidenced in writing, including email, by an authorized representative of each party.

**2. ASSUMPTIONS.** The performance of all Services and the delivery of all Deliverables under this SOW #2 are subject to the following assumptions and limitations. Client agrees that Panorama will not be responsible for any Services or Deliverables (or any other obligation or responsibility) required or resulting due to any inaccuracies or omissions from the following assumptions or limitations and that any such Services or Deliverables will be deemed outside of the scope of the Services and Deliverables set forth in this SOW #2.

- Panorama Services will begin as early as February or March 2022 and will be completed in their entirety no later than December 31, 2022.
- Panorama will work with Client to define and continually refine a dynamic project plan.
- Client will provide an internal project manager to work with Panorama to manage and/or coordinate internal Client resources.
- The functional scope of this CEP Assessment includes eight discovery sessions with the Town of Apex subject matter experts, plus one discovery session with the Town of Cary 311 Department.
- This project will be conducted remotely via video conference. If on-site presence is required and mutually agreed to, costs for travel time and expenses will be billed in addition to the fees outlined in Section 1.
- If travel to Client is required and agreed to, the travel time and expense limitations outlined in Section 3 assume a maximum of 2 visits throughout the course of the project: one 2-day trip for 3 team members, and one 2-day trip for 2 team members. If additional visits are requested, prior written approval from Client will be required.
- The Client team will provide input, business expertise, and timely Deliverable review and validation in the completion of this project.

**3. FEES, EXPENSES AND PAYMENT.** Client will pay Panorama the following Fees and Expenses. All Fees and Expenses will be due and payable under the terms set forth in the Agreement at the rates specified in this SOW #2:

Panorama's Fees for the above scope and Deliverables will be billed on a time and materials basis, plus travel expenses, based on the following schedule:

- Managing Director/Director: \$250/hour
- Senior Manager: \$230/hour
- Manager: \$200/hour

- Senior Consultant: \$180/hour
- Consultant: \$165/hour
- Business Analyst: \$145/hour
- Software Developer: \$170-\$195/hour
- Functional / Technical Software Consultant: \$170-\$235/hour
- System Architect: \$195-\$215/hour
- Advanced Functional / Technical Software Consultant: \$235-\$270/hour

If travel is requested by Client, Panorama’s fees for travel time to and from Client locations will be billed at 50% of the above rates. Panorama will provide Client with an invoice for its fees, plus actual travel expenses, semi-monthly (meaning twice per month) for the duration of the project. Travel time and expenses not included in the Estimated Project Cost in Section One of this SOW#2 shall not exceed \$15,000.00 without prior written approval of Client. Client and Panorama acknowledge that, on an ongoing basis, Client and Panorama will mutually agree upon the dynamic project plan and staffing of resources for each phase of the project. Payment for submitted invoices will be due within 30 days of receipt.

**4. TERM AND TERMINATION.** Unless earlier terminated as provided herein, the term of this SOW #2 will commence on the SOW #2 Effective Date and will continue until project completion. This SOW #2 may be terminated as set forth in the Agreement.

**5. AFFIRMATION OF THE AGREEMENT.** The parties affirm their respective obligations and covenants set forth in the Agreement and acknowledge that this SOW #2 is subject to the terms and conditions of the Agreement except where specifically mentioned otherwise in this SOW #2.

The parties, through their duly authorized representatives, HAVE READ, HAD THE OPPORTUNITY FOR REVIEW BY AN ATTORNEY, AND AGREE TO BE BOUND BY THIS STATEMENT OF WORK #2, INCLUDING ALL TERMS CONTAINED ON THE PRECEDING PAGES HEREOF AND IN THE CONSULTING SERVICES AGREEMENT, AS OF THE EFFECTIVE DATE.

<p><b>FOR PANORAMA:</b>  <b>PANORAMA GOVERNMENT SOLUTIONS, LLC</b></p> <p>Signed: <u>Calvin Hamler</u></p> <p>Name: <u>Calvin Hamler</u></p> <p>Title: <u>Managing Director</u></p> <p>Date: <u>February 11, 2022</u></p>	<p><b>FOR CLIENT:</b>  <b>TOWN OF APEX, NORTH CAROLINA</b></p> <p>Signed: _____</p> <p>Name: _____</p> <p>Title: _____</p> <p>Date: _____</p>
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Attest:

\_\_\_\_\_  
Interim Town Clerk

*This instrument has been preaudited in the manner required by the Local Government Budget and Fiscal Control Act.*

\_\_\_\_\_  
Finance Director

**STATEMENT OF WORK #2 – APPENDIX A**

**Project Phases, Activities, Tasks, and Deliverables**

Phase	Activity	Task	Deliverable
Plan	Project Planning	Build Project Plan	
		Prepare/Debrief Project Team	
		Planning Meetings	
		Session Scheduling	
		Prepare Workshop Guides	
		Prepare Kickoff Materials	
Phase 1	Project Kickoff	Business Overview Session	
		Conduct Project Kickoff	
	Technology Assessment	Current State IT Overview	
		Document Current Systems Map	Current State Systems Map
	Business Process Assessment	Discovery Sessions	Total of 8 sessions @ 2 hours each, and 1 session with Cary @ 4 hours each
		Document Processes & Pain Points	Current State Process Maps
Document Initial Requirements, Perform Benchmarking		Requirements Document and Current State Assessment (including findings from Cary and other external sources)	
Phase 2	Strategic Roadmap	Prep and Conduct 1 day Workshop with Town SME's to Define Objectives for Successful Citizen Engagement Program	City's Citizen Engagement Goals, Objectives, Strategy
Phase 3	Future State Design	Customer Journey Sessions	Critical to Satisfaction (CTS) Chart
		Send out and review citizen engagement surveys	Compile citizen surveys
		Research best practices for citizen engagement	
		Future State Design Sessions	
		Document Future State Processes	Revised (Future State) Process Maps
		Develop KPIs	
		Document KPIs	KPI Requirements
	Organizational Change Management (Optional)	Develop Communications Strategy	Communications Plan
Manage	Project Governance: Selection	Conduct Project Status Meetings	
		Calls, Emails, Deliverable Review	