CARTERSVILLE, GA
TASK ORDER 1.3: SCOPE OF SERVICES AND PRICING

Public Outreach, Change Management, Project Management Services

Task Number	Project	Proposed Start Date
1.3	Advanced Metering Program	
Task Order Cost	**Contingency Allowance**	**Target Completion Date:**
$392,472	$537,000	

Package Includes:

UMS Services ☐　　[THE CITY] Requirements ☐　　Service Fee Applied ☐

Software / Material Purchase ☐　　Sub-Consultant Services ☐　　Special Conditions ☐

Resources Assigned:	Interdependencies:	
BM – Barry Melvin ☒ TW – Tyler Wagner ☒ RT – Rhyne Timberlake ☒ CT – Chelsea Tucker ☒	Task Order 1.2 AMI Software and Hardware Procurement and Task Order 1.2A AMI Readiness Network deployment Sensus	**After:** N/A
Task Scope Summary: See Attached		
UMS Project Manager: Barry Melvin / Chelsea Tucker (Coordinator)		
[THE CITY] Project Manager: Dan Porta		
UMS Signature		Date:
[THE CITY] Signature		Date:

TASK ORDER 1.3

EXECUTION I PROJECT MANAGEMENT, PUBLIC OUTREACH AND CHANGE MANAGEMENT

UMS will provide the following services throughout the Advanced Metering deployment phase.

TASK A: PROJECT INITIATION/TRAINING/GOVERNANCE

UMS will oversee all aspects of the Advanced Metering program, including scheduling, scope, budget, communications, resources, and risks. UMS will provide structured project management to ensure that all project components are executed in a timely, organized fashion and completed to specification. As communication is a critical success factor, the UMS Project Manager will ensure that all designated The City team members are aware of project status and issues.

UMS will track this task order to ensure that work stays within scope and initiate change requests for approval by the City if required. Managing project deliverable timeliness, quality, and project costs are measures of success and the City's satisfaction. UMS delivery methodology employs a quality monitoring process whereby senior management within the Service Delivery Organization will monitor all timelines, quality, and project costs adherence to ensure success in all areas.

Project Management activities include:
- Manage project vendors
- Manage project budget
- Manage project scope
- Manage project master schedule
- Manage project issues and risks
- Manage project communications
- Manage development and execution of Public Outreach Plan
- Manage project execution plans:
  - AMI Systems Integration
  - Network Implementation
  - AMI Software Implementation and Testing
  - AMI Training
  - Meter Equipment Deployment

VENDOR MANAGEMENT

UMS will oversee and manage vendor-assigned activities, plans, schedules, and budgets related to AMI software setup and testing, systems integration, AMI network setup, and meter installation services.

BUDGET, SCOPE, AND MASTER SCHEDULE MANAGEMENT

UMS will track and manage expenditures related to the delivery of the Advanced Metering solution. UMS will monitor scope to ensure vendors are delivering the scope as outlined in the agreements. UMS will maintain a master project schedule covering milestones and activities for all assigned stakeholders and vendors.

ISSUES AND RISK MANAGEMENT

UMS will perform an initial risk assessment and create a mitigation strategy for risk with a medium to high impact. The risk management plan will be monitored and refined throughout the delivery of the project. UMS will create and maintain an Issue Log to ensure issues are identified, documented, and resolved quickly to minimize impacts to the project.

PROJECT TRAINING

UMS will review vendor training plan(s) for completeness and supplement the plans as required. UMS will work with the vendors and the City to identify training frequency, the participants for each session, and the proposed training schedule(s) throughout the deployment phase. The goal is for all employees who will interface with the new technology to become informed and understand how they will utilize the new technology as part of their role. Once all details are solidified, UMS will integrate the plan into the PEP as one cohesive Program Training Plan.

EXECUTION PLAN MANAGEMENT

UMS will manage and drive the execution of the Project Execution Plan, covering the following areas:

- AMI Systems Integration
- Network Implementation
- AMI Software Implementation and Testing (Functional Testing, Integration Testing, User Acceptance Testing)
- AMI Training
- Meter Equipment Deployment

TASK B: PUBLIC OUTREACH

UMS will develop a project stakeholder communication plan that will establish key status and metrics or Key Performance Indicators (KPIs) for the project, and the method and frequency for status updates.

PUBLIC RELATIONS PLAN

UMS will support the City's efforts in developing project awareness and updates to the City's customer base and internal personnel. The City will create a custom community outreach collateral to inform both the public and internal staff of the benefits of the upgrade program, and will work with the UMS team to ensure deployment triggers are met to support a successful deployment project..

TASK C: POST AMI NETWORK INSTALLATION/INTEGRATION TESTING

This task will leverage the Vendor's propagation study to establish and communicate network coverage expectations. UMS will work with the vendor to support the implementation of the work plan determined required for each network site. This work may include permit requirements, a data collector, an antenna, as well as cabling placement, equipment requirements and specifications, trenching, and electric and data backhaul services.

 In addition, UMS will work with the City to execute the testing plans developed in the readiness scope of work for each component of the solution to ensure the City's objectives are met as outlined in the PEP.

UMS will oversee the integration test and UAT plan development in conjunction with the vendors and the City.   UMS will develop a proposed testing schedule and specify what testing will be conducted during the implementation phase.

The testing process will include the developed testing plan, including pertinent use cases and test scripts as well as a formal method for recording, compiling, and reporting the test results. UMS will employ a defect reporting and tracking methodology to track those test results that fail and ensure resolution.

PRICING SUMMARY

Task Order 1.3: Cost Breakdown

Task	Description	Unit	Budget	Actual Cost
	UMS TASK ORDER 1.3 UNIT COST BREAKDOWN			
A	Project Initiation / Training / Governance	1	$ 332,472.00	$ 332,472.00
B	Public Outreach Campaign	1	$ 120,000.00	$ 0.00
C	Post-AMI Network Installation / Integration Testing	1	$ 60,000.00	$ 60,000.00
	TOTAL			$ 392,472.00

Task Order 1.3: General Assumptions

- Task A billed 50% at time of task initiation and 50% at task completion.
- Task B activities have been assumed by the City. UMS is not responsible for the execution of this line item.
- Task C billed 50% at time of task initiation and 50% at task completion.