



Prepared by:

Brad Schmidgall

bschmidgall@burwood.com

1(312) 576-0292

The City of Aurora

SharePoint Transformation

12/1/22

Version 2.0

Revision History:

1.0 10/25/22 by Brad Schmidgall

2.0 11/11/2022 by Brad Schmidgall

Table of Contents

1	Project Approvals	3
2	Executive Summary	4
3	Project Background	5
4	Objectives	5
5	Scope of Services	5
5.1	In-Scope	5
5.2	Out-of-Scope	11
5.3	Deliverables	11
5.4	Assumptions	12
6	Approach and Schedule	13
7	Project Organization and Roles	13
8	Professional Fees and Expenses	16
	Appendix A - Legal Terms and Conditions of Engagement	16
	Appendix B - Project Change Control Document	19

1 Project Approvals

Signatures below represent approval of both parties to execute this Proposal for Services according to the Scope, Deliverables, Approach, Schedule, Assumptions, and Cost described in this document. Please view *Section 9: Professional Fees and Expenses* for a detailed description of billing arrangements.

Accepted by:

***The City of Aurora,
an Illinois Municipal Corporation***

Burwood Group, Inc.

By _____
Authorized Signature

By _____
Authorized Signature

Name (print or type)

Name (print or type)

Title

Title

On _____
Date

On _____
Date

2 Executive Summary

The City of Aurora Need			
<p><i>The City of Aurora is seeking to replace an outdated on-premises SharePoint platform that recently lost maintenance support. The City has partnered with Burwood to conduct discovery of the data environment, and to ultimately migrate the relevant data to SharePoint Online. The initial phase focused on assessing the data in the current environment and identifying which data needed to be preserved and migrated.</i></p>			
Solution			
<p><i>Burwood Group will take a phased approach to transforming City of Aurora’s Microsoft SharePoint environment. The initial phase of this engagement will be centered around designing the architecture and training material and strategy prior to the City of Aurora change freeze at calendar year end. Following that, there will be a second phase for remediation to get the Police Department on the appropriate Teams and Exchange tenant as well as address workflow and customization rebuilds. The third phase will include the environment build process. The final phase will include the actual migration and actual end user training delivery as well as knowledge transfer and project wrap up.</i></p>			
Approach		Investment	
Phases	Two Phases	Structure	Fixed Fee
Duration	20-24 Weeks	Total Cost	\$265,000
Critical Personnel	Senior PM, Practice Lead, Senior Consultant (Technical), Senior Consultant (Training)	Payment Schedule	\$\$66,250
			Due at signing
			4 invoices

3 Project Background

Burwood Group is pleased to present this proposal to The City of Aurora for the SharePoint Transformation. We are excited about this opportunity and look forward to working with The City of Aurora as a strategic partner. This proposal is valid for 45 days from 12/12/22. Burwood reserves the right to re-price open proposals after 45 days.

4 Objectives

We understand the objectives of the SharePoint Transformation are to:

- Build out a modern intranet on Microsoft cloud for an improved end user experience
- Develop repeatable business processes across departments
- Implement a compliant environment for both police and all city departments across multiple tenants in line with industry standards

5 Scope of Services

5.1 In-Scope

We understand the scope of Burwood Group's involvement in the SharePoint Transformation to include:

- **Project Set Up / Kickoff**
 - Administrative Tasks
 - Project Setup Tasks
 - Internal Tasks, Kickoff, Close, Documentation review, Etc.
 - Project Management - Weekly Tasks
 - Weekly project plan updates, tasks assignments, and dashboard
 - Daily coordination/follow-up

- Time management system updates / forecasting
- Project financial tracking

- **Design & Architecture Phase**

****The initial phase of this engagement will be centered around designing the architecture and training material and strategy prior to the City of Aurora change freeze at calendar year end****

- Design the Following:
 - Site Template 2
 - Branding
 - Information Architecture
 - Governance Policies
 - DLP Labeling
 - Archive Policy
 - MMS Groups (2)
 - Terms
 - Mapping Managed Property Mapping
 - Permission Design
 - Microsoft Search Center
 - Content Storage Policy
- Current State Assessment for Training
 - Workshop with departmental leadership teams to identify specific needs/use cases
 - Develop & Deploy Organizational Readiness Assessment to determine gaps/comfort
 - Readiness Assessment review and presentation
- Develop Organizational Communication

- Identify comms resources and media placement locations
- Ongoing workshops with comms resources
- Develop comms plan/campaign
- Develop messaging efforts
 - Work with CoA comms resource(s) for message placement
 - Develop Training Content
 - Gather Training Requirements and Scenarios
 - Develop Draft Training Plan / Content Outline
 - Finalize Draft Training Plan / Content Outline
 - Develop Draft Training Content
 - Finalize Training Content
 - Develop Pre and Post Training Surveys
 - Develop Microlearning videos (YouTube style), Reference Guides, etc.
- **Remediation & Build Phase**

****There will be a second phase for remediation to get the Police Department on the appropriate Teams and Exchange tenant as well as address workflow and customization rebuilds. The third phase will include the environment build process****

- Build
 - Complex Sites
 - 3rd Party Tool Config
 - Migration Plans
 - Migration Policies
 - Form Build
 - Default Sites

- Portal Home
- Microsoft Search
- Alerts
- Workflow
- Approvals
 - Audience Targeting
 - Permission Management
 - Site Tagging
- Optimize
 - Archive Content
 - Site Structure
 - Navigation Elements
- Migrate
 - Pilot Migration
 - Sprint Migration
 - Validation
 - Access
 - Mediate Issues
 - Hypercare
 - Launch Dates
 - Acceptance
- Training
 - Content Retrieval

- Approvals
- Collaboration
 - Search
 - Archiving
- Teams Remediation
 - Communication Plan
- Inventory
 - Team Settings
 - Permissions
 - Conversation History
 - Channels
 - Apps
 - Policies
 - Tabs
 - SharePoint
 - Build Groups

- **Migration & Training Delivery Phase**

****The final phase will include the actual migration and actual end user training delivery as well as knowledge transfer and project wrap up.****

- Migrate Teams
 - EOL old instance
- Planning and Preparation
 - Conduct discovery sessions and collect environmental information

- Identify infrastructure changes
- Plan for domain validation and preparation
- Tenant Preparation
 - Assist customer with cleanup of attributes
 - Ensure Outlook client and workstation readiness
 - Sync identities to Target O365
 - Domain verification of source on Target O365
 - Create and verify migration file
 - Prep for MX record change
- Migration Tool Setup
 - Configure Migration Tool
 - Prepare/Deploy profile tool
 - Begin mailbox seeding process & monitor
- Cutover
 - Disable Sync to source
 - Remove Source domain
 - Complete verification of source domain on target
 - Signal outlook clients of update while cutting over mailboxes
 - Configure DNS records
- Post Deployment
 - Troubleshooting/Support
 - Service Delivery Management
 - Migration Documentation

- Training Deployment
 - Determine Training Deployment Approach - enrollment/registration
 - Develop Training Schedule
 - Identify location for Training and Reference Content
- Training Delivery
 - Deliver Training Sessions (in-person or remote) - assume 1.5 hours with 25 max attendees
- Training Wrap Up
 - Collect Survey Results and Training Presentation

5.2 Out-of-Scope

Burwood Group understands that the following items are not within the scope of our responsibilities:

- Migration tool (AvePoint) and process management tool (Nintex) are not included in the pricing of this SoW
- Microsoft licensing changes are not included in the pricing of this SoW
- Intranet content development (could be included in future SoW)
- Ongoing maintenance and support of the new environment post project
- Training beyond the in-scope detail provided in prior section

Any changes to the scope outlined or assistance with other The City of Aurora initiatives will require a separate arrangement. Burwood Group will utilize the Project Change Control Document in Appendix B if changes are required.

5.3 Deliverables

Burwood Group understands the deliverables for the SharePoint Transformation to be:

- Live SharePoint online intranet
- Migration of legacy content to new SharePoint platform
- Migration of Teams and Exchange for police department

- Knowledge transfer materials to include:
 - End user training content
 - Administrator content for ongoing platform governance

5.4 Assumptions

Burwood Group understands the assumptions for the SharePoint Transformation to be:

- Regular project management “best practices” will be incorporated throughout the project (e.g., weekly status reporting, issues management, etc.).
- Burwood Group will provide the client with a weekly status report, describing work that was performed during the past week, work to be performed the next week, key issues, and items for management attention.
- Burwood Group is not responsible for manufacturer products (hardware or software) that do not perform as specified. Burwood Group time and effort involved in identifying, supporting, and resolving such manufacturer hardware and/or software issues is outside the scope of services as outlined in this proposal. The manufacturer is expected to solve defects in the hardware and/or software they supply. Any additional effort required by Burwood Group to assist in resolution will require a Change Request.
- The client will diligently work with Burwood Group to accomplish signoff within 10 working days upon successful completion of this engagement.
- The client will align the incentives and objectives of employees and other vendors to cooperate with Burwood Group resources; and will provide the appropriate staffing levels to ensure the success of the project.
- Work may be performed onsite, remote or a hybrid of both based on the requirements of the engagement. It is the responsibility of the client to provide Burwood Group personnel with adequate access and resources to complete the obligations of this proposal. Resources include, but are not limited to, remote access, office space for staff as needed, internet connectivity, conference rooms for meetings / workshops, and access to building areas necessary to complete this project.
- Burwood Group will work with the client to define all critical path items and time sensitive resource requirements prior to project kickoff.
- Burwood Group and the client will agree on a start date and end date for this project. Any delays caused by the client that extend the project timeline will be assessed for impact to scope and project costs. Any impact to project scope or cost will be assessed and presented to the client as a Project Change Request. Burwood will be responsible for documenting the delay and presenting that documentation to the client.
- The client will designate a responsible party to act as a liaison for the duration of this engagement. This liaison will be the primary contact for issue resolution and logistical support for the life of this project.

- The client will provide Burwood Group consultants with appropriate access to the systems as necessary to include but not limited to, reviewing configurations, performing design and implementation work.

Any changes to project requirements and these assumptions may impact project scope, duration, cost, and deliverables, resulting in issuance of a Change Control (see section Appendix A – Legal Terms and Conditions and Appendix B – Change Control Document).

6 Approach and Schedule

Burwood Group will apply a phased approach to the SharePoint Transformation. We expect the project to take approximately 20-24 Weeks leveraging a blended resource mix of 2 FTE's throughout the engagement.

7 Project Organization and Roles

Burwood Group project manager and consultants will obtain direction from Michael Pegues at The City of Aurora. The Burwood Group team proposed for The City of Aurora is experienced in all aspects of the execution of this project, both technically and from a project management perspective. The team structure represents how our team will work with you and align to your business, technology, and technical stakeholders. We are passionate about developing relationships with you as partners through this project, and by teaming at all levels of the project structure, we facilitate enhanced knowledge transfer to enable your ability to sustain the operation after the consultants have gone. Other Burwood Group resources will be utilized as necessary to meet the objectives of this arrangement and to deliver the value expected from our organization.

A Burwood Group Project Manager (PM) will act in the capacity of project team leader and as liaison to your team's project management team lead. In this capacity, the PM is the Burwood Group primary point of contact for day-to-day project activities, issue resolution, escalation, resource management, scope, and logistical support for the life of the project. The PM's Burwood team counterpart will be the Burwood Technical Lead, responsible for executing the technical scope of work. While not all resources may be committed at this time, Burwood Group will work with The City of Aurora to confirm staffing, start dates and timing or key project milestones.

The following Burwood Group and The City of Aurora roles are critical to the success of the project. Additional subject matter experts may be consulted as needed.

Burwood Group Role	Burwood Group Responsibilities
Project Manager	<ul style="list-style-type: none"> • Manages the project scope, timeline, resources, and budget • Facilitates key project meetings (e.g., kick-off) • Leads development of Burwood Group project deliverables • Tracks and maintains issues and key decisions
Technical Lead / Consultant	<ul style="list-style-type: none"> • Responsible for technical guidance, execution, and subject matter expertise • Support development of all project deliverables • Maintains integrity and managers work against project scope
Managing Consultant	<ul style="list-style-type: none"> • Burwood Group technical subject matter expert responsible for technical quality assurance and review
Account Executive	<ul style="list-style-type: none"> • Responsible for the overall customer relationship and partner development • Provides a conduit to Burwood Group thought leadership and subject matter expertise • Participates in key strategic sessions as needed
Client Executive	<ul style="list-style-type: none"> • Responsible for ensuring client satisfaction • Client advocate focused on maintaining highest standard of service delivery

The City of Aurora Role	The City of Aurora Responsibilities	Time Commitment
Executive Sponsor / C Level Manager	<ul style="list-style-type: none"> • The Executive Sponsor provides executive level support and funding, championing the project and providing periodic updates to senior leadership 	2-5%
Steering Committee	<ul style="list-style-type: none"> • Provides input to the Executive Sponsor on major decisions, changes in scope, issue resolution and champions the project for their areas. Includes a Business Owner, who ensures quality business decisions are made, and a Technical Owner, who ensures alignment of the IT architecture and strategy to the business objectives. 	20%
Technical Lead	<ul style="list-style-type: none"> • Provides technical/functional area ownership and expertise • Works alongside Burwood Group team member day-to-day in area of technical knowledge and responsibility • Reviews and provides feedback/recommendations for deliverables that impact their area (e.g., policies, processes, technology design, etc.) 	75%
Client Project Manager	<ul style="list-style-type: none"> • The client Project Manager is the interface to the Burwood Group PM; is accountable and responsible for providing overall day to day project oversight to ensure that all project deliverables (Business and Technology) and outcomes are implemented on time, on budget, and meet the expectations of the business. 	75%

The City of Aurora Role	The City of Aurora Responsibilities	Time Commitment
Subject Matter Experts	<ul style="list-style-type: none"> • Provide expertise related to RFP requirements (functional and technical requirements, as well as use cases and scenarios) • Provide necessary inputs and participate in requirements gathering sessions as needed 	20%

8 Professional Fees and Expenses

This project is bid on a fixed price/fixed time basis. The professional fees for this engagement will be \$265,000. Burwood Group, Inc. estimates this project will last a duration of 20-24 weeks. Burwood requires 25% of the project’s total cost, or \$66,250, at signing.

SERVICES	FEES
Burwood Group Consulting Services for The City of Aurora SharePoint Transformation	\$295,000
Discounted Pricing after Reduction Related to Police Department Tenant Requirements (\$20,000) & New Client Discount (\$10,000)	\$265,000

- Travel costs are not included and will be billed as actual costs.
- **The City of Aurora** will reimburse Burwood Group for all reasonable and necessary business and travel expenses and pass-through costs actually incurred by Burwood Group while performing services at cost without mark-up (“Reimbursable Expenses”).
- Burwood Group will adhere to **The City of Aurora** policy and procedure regarding travel, expenses, and meetings. If **The City of Aurora** does not have a travel policy, Burwood Group will adhere to the Burwood Group travel policy.

If the project duration extends beyond the agree-upon timeframe from the date of project commencement the project change control process will be executed. Utilizing this change process, Burwood will re-bid the remaining effort to complete the affected work streams. Both parties must approve the change with respect to scope and charges before completion of the work streams.

Appendix A - Legal Terms and Conditions of Engagement

Services Payment Procedures

In addition to the terms and conditions of any Master Services Agreement, the services described in this proposal for services will be provided subject to the following terms and conditions.

The invoicing process will be broken down as follows:

INVOICE #	DESCRIPTION
Invoice One	25% of the Fixed Price Cost upon proposal signature
Invoice Two	25% of the Fixed Price Cost upon start of Design & Architecture Phase
Invoice Three	25% of the Fixed Price Cost upon start of Remediation & Build Phase
Invoice Four	25% of the Fixed Price Cost upon completion of Project Close

Either the client or Burwood Group may request in writing a change to scope or manner of provision of the Services, subject to the following change order process:

- a. All requests for a change to the services shall be submitted using the form listed in Appendix A by the requesting Project Manager (a “Change Order”). Change Orders shall not be required for services that are inherent, necessary, or customarily part of the services required by Burwood Group to meet the Acceptance Criteria.
- b. The Change Order will describe at a reasonable level of detail the change, the rationale for the change and the impact the change may have on the services both if it is accepted and if it is rejected.
- c. The Project Manager will review the Change Order with the client Project Lead and Service Delivery Director/Client Executive either:
 - i. Approve it in writing. Upon such approval, the change will be implemented through a written authorization that may only be signed by the authorized representatives of the client and Burwood Group; or
 - ii. Agree in writing to submit the Change Order for further investigation. Such investigation will determine the technical merits and the effect on price, schedule, and other terms and conditions that may result from the implementation of the Change Order.
- d. The client and Burwood Group will then agree to mutually approve or reject the Change Order. If client and Burwood Group do not agree, the parties shall attempt to resolve the disagreement in the manner set forth in the Agreement; or
 - i. Reject it. If rejected, the Change Order will be returned to the requesting Project Manager along with the reason for rejection.

Once agreed to by the parties (and executed by an authorized representative of client and Burwood Group), a Change Order shall be incorporated into and become part of this SOW.

Out-of-pocket Expenses

Additional out of pocket expenses for travel, accommodation, project supplies, etc., will be billed directly back to the client at cost. Burwood understands that all expenses require written prior client approval.

Purchase Orders and Remittance Information

Purchase Order Address

Burwood Group, Inc.
125 South Wacker Drive, Suite 2950
Chicago, IL 60606

State Tax ID 2861-2671
Federal Tax ID 36-4180073

Remittance Address

Burwood Group, Inc.
Attn: Accounts Receivable
8582 Solutions Ctr
Chicago, IL 60677-8005

Responses

Any responses or questions regarding this proposal should be directed to:
Brad Schmidgall

At bschmidgall@burwood.com
1 (312) 576-0292

Invoices

Invoices shall be sent to:
Michael Pegues
The City of Aurora
44 E. Downer Place
Aurora, IL 60505

Appendix B - Project Change Control Document

REQUEST (COMPLETED BY REQUESTER)	
AUTHOR:	
DATE OF REQUEST:	
CHANGE #:	
TITLE OF CHANGE:	
DESCRIPTION OF CHANGE:	
REASON FOR CHANGE:	
HARDWARE REQUIRED:	
SOFTWARE REQUIRED:	
ACTION REQUIRED:	
TARGET COMPLETION DATE:	
CHANGE REQUESTED BY:	

IMPACT (COMPLETED BY PROJECT MANAGER)	
TIMELINE IMPACT:	
COST IMPACT:	
OVERALL IMPACT:	
PM COMMENTS:	
PROJECT MANAGER (Burwood):	
SERVICE DELIVERY DIRECTOR / CLIENT EXECUTIVE (Burwood):	
(BURWOOD SIGNATURE/DATE):	
CHANGE APPROVER (Client):	
(CLIENT SIGNATURE/DATE):	

Instructions: The **Request** portion of this form is to be filled out by the requester and delivered to the Project Manager. The Project Manager will research the impact on the project timeline as well as any cost or resource impact and complete the **Impact** portion of this form. The approval authority for the project will then sign the **Approval** portion before any work can take place and return the form to the Project Manager for action. The Project Manager will take appropriate action to implement the approved Change Request, document the change in the **Work Record** portion of this form, and make any required adjustments to the timeline and financials. This completed form will be retained as part of the permanent project file.