

CHANGE REQUEST 01

CONTRACT IDENTIFIER

F18-ADM-2018-027

SHAREPOINT DOCUMENT AND RECORDS
MANAGEMENT INTRANET

stoneshare

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1. TRACKING INFORMATION

CHANGE REQUEST TRACKING	
Request Number	01
Request Title	SharePoint Online Implementation
Request Date	March 15 th , 2019

2. REASON FOR CHANGE

The City of Clarence-Rockland (the City) engaged StoneShare to develop and implement a “centralized” Electronic Document and Records Management Solution (EDRMS) using on-premise Record Centers in SharePoint 2013. Upon further consideration, the City now wishes to implement a more modern EDRMS design where documents and records will be managed in-place using SharePoint Online. This requested change is in line with recognized best practices for Records Management supported by organizations like AIIM, ARMA, Gartner and Forrester.

3. PROJECT ACTIVITY TABLE

In the pages that follow, StoneShare has provided a Deliverable Table containing the Major Deliverables, Assumptions and Constraints that are included in an implementation of this scope of work. The Deliverables are described in detail, listed chronologically, and separated by Project Stream for ease of reference. A RACI model has been incorporated to assist SJA in understanding its responsibilities in the completion of each Deliverable, and the Deliverable format is outlined for further clarity.

The deliverables, and their associated definitions, are provided in the Deliverables Table below. For clarify, the following applies:

R = Responsible to performs the action/task.

A = Accountable that the action/task is completed.

C = Consulted before performing the action/task.

I = Informed after performing the action/task.

The following Activity Table is to be removed from the Statement of Work (SOW).

Project Activity Table				
Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
PROGRAM MANAGEMENT STREAM				
Project Repository Deployment	StoneShare will provide access to a SharePoint Online site, called the Project Repository. Members of the City's project team can securely access the site over the Internet using any browser supported by SharePoint Online. The Project Repository will be used to centralize and maintain all Project information (Project Contacts, Calendars, Documents and Lists); automate Project processes such as Deliverable Approvals; provide a formal	I	R+A	SharePoint Site

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<p>mechanism for the City to provide feedback on document Deliverables; and to act as an example for the project team of how SharePoint can be configured for a practical application.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The Project Repository will be managed and maintained by StoneShare. The City's Project Manager or Project Team members may request access to the project site by contacting StoneShare support, subject to the approval of the City's Project Manager. The Project Repository will remain open until Contract closure and will be archived thereafter with the contents becoming the property of the City. This activity does not require acceptance. 			
<p>Detailed Project Plan and Schedule [Staff Review]</p>	<p>Working from the Project Schedule from this Proposal, StoneShare and the City will develop a detailed Project Plan and Schedule that will outline the Project Phases, Tasks, Responsibilities, Dependencies, Resourcing, and Timelines.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will iterate with the City until a mutually acceptable Project Plan is established. The City will be responsible for scheduling Internal Resources to contribute in accordance with the Project Schedule. The Project Schedule will be managed and maintained by StoneShare throughout the Project. StoneShare will use our own format for this deliverable, to be provided in English. This Deliverable requires City staff review and formal acceptance. 	C	R+A	<p>MS Word (Project Plan) and MS Project or MS Excel (Project Schedule)</p>
<p>Project Management Plan</p>	<p>As per RFP Section 2.3.11, StoneShare will provide the City with a Project Management Plan describing the Project Methodology, project management practices and how the project will be executed and maintained. The document may include some, or all, of the following, and will be customized after Contract award:</p> <ul style="list-style-type: none"> Approach Objectives 	I	R+A	MS Word

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> • Project Schedule • Resource Roles and Responsibilities • Resource Contingency • Communications • Quality Management • Testing and Transition • Training and Coaching • Acceptance Criteria • Support <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • This deliverable does not require formal acceptance or sign-off. • StoneShare will use our own format for this deliverable, to be provided in English. 			
Kick-Off Meeting [Meeting]	<p>StoneShare will lead an on-site Project Kick-Off, with a Presentation, for the purpose of meeting the City's Project Team, introducing the engagement and reviewing the Scope, high-level schedule, and approach to delivering the Project.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare will prepare for and attend one (1) meeting of up to two (2) hours in length. • The City will provide the required meeting space. • The City will provide StoneShare with the Project Charter or Business case at least ten (10) days in advance of the meeting. • The City will ensure that the SharePoint Working Group, Executive Sponsor, Business User Stakeholders, and IT Stakeholders are present at the meeting. • The meeting will be scheduled at a mutually acceptable time at least ten (10) days in advance. • The City will ensure that all required equipment is set up and fully operational. • This activity does not require acceptance. 	I	R+A	Scheduled Session and MS PowerPoint

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
Project Status Meetings [Meeting]	<p>StoneShare will prepare for and conduct remote, weekly Project Status Meetings to report on the overall status of the project, discuss current and upcoming deliverables, highlight risks or issues, identify and review action items, and answer questions. Following each Project Status Meeting, StoneShare will produce and deliver weekly Project Status Reports and post the same to the Project Repository for review.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will conduct bi-weekly Project Status Meetings of up to one (1) hour in length. The City will ensure that project Stakeholders are available and present at each meeting. Project Status Meetings will be conducted remotely via web-conference. StoneShare will complete the necessary preparation work, including the production of supporting materials. StoneShare will record all meeting minutes and will use our own format for this activity. StoneShare will post meeting minutes to the Project Repository Site to facilitate the collaborative access of information. This activity does not require acceptance. 	I	R+A	MS Word
INFORMATION TECHNOLOGY STREAM				
Physical Architecture Review and Implementation Assistance [Meeting & Staff Review]	<p>StoneShare will review the City's existing and proposed physical SharePoint physical infrastructure and make recommendations to meet the City's stated goals based on experience and industry best practice. Please see "REVIEW OF PROPOSED MACHINE SPECIFICATIONS" in Section "STATEMENT OF UNDERSTANDING" above for a preliminary analysis and recommendations based on the information available in the RFP. StoneShare will document the target physical architecture in the Solution Architecture Document and work with the City staff to ensure that all SharePoint pre-requisites are met. This activity will meet the stated requirements in section 2.3.1.1 of the RFP with the following assumptions:</p>			Infrastructure MS Word

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<p>Assumptions/Constraints</p> <ul style="list-style-type: none"> The City will provide a documented list of their short-term and long-term goals for the SharePoint platform by the kick-off meeting. For all deliverables and activities in this contract, StoneShare assumes the scope does not includes any requirements beyond the stated requirements for the initial implementation. StoneShare assumes that the City does not require StoneShare to specify, install, configure, or prove a potential future state or meet documented or undocumented future requirements, for example requirements related to disaster recovery, Internet, extranet, unless these are explicitly called out as “Vendor Requirements” in the RFP. The City will provision the Physical Infrastructure environment according to the specification in the Architecture document, in the time allotted in the Project Plan. The City will be expected to make their Subject Matter Experts in Exchange Server, network, database and security infrastructure available for up to two (2), two (2)-hour information gathering sessions and for ad hoc questions and configuration tasks. Prior to installation activities, the City will provide StoneShare with accounts and privileges as requested to perform the installation and related activities. The Solution Architecture document will itemize all SharePoint, SQL Server, and Microsoft Office software and licensing that will need to be procured for the installation of the SharePoint 2016 platform. This Deliverable requires City staff review and formal acceptance. 			
<p>SharePoint Installation and Updates [Meeting & Staff Review]</p>	<p>StoneShare will review the City’s licensing and list the City’s software licensing requirements for SharePoint and dependent products in the Solution Architecture document. StoneShare will install SharePoint according to the agreed architecture, recording Installation and configuration steps in the As-Built Guide, meeting the Vendor Requirements listed in RFP section 2.3.2.1 with the following assumptions</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> Installation includes one (1) SharePoint farm in the production environment. 			<p>Installed Software MS Word</p>

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> The RFP does not list a requirement for browser-based versions of Word, Excel and PowerPoint, so this proposal does not include installation of the Office Web Apps Server product. Note that Office Web Apps Server requires an additional dedicated server separate from the SharePoint Farm. The City will designate a licensing contact or contacts who will be responsible for contacting the provider to answer questions or purchase required licenses. The City will procure the required software and licenses as specified in the Architecture document prior to installation. Prior to installation activities, the City provided StoneShare with accounts and privileges as requested to perform the installation and related activities. Email integration is explicitly the three email requirements mentioned in section 2.3.2.1: configure email destinations for Document Libraries, email alerts for Libraries and email alerts for Workflow tasks. This Deliverable requires City staff review and formal acceptance. 			
SharePoint Business Applications Creation and Configuration [Meeting & Staff Review]	<p>StoneShare will document the recommended SharePoint Service applications for the City's requirements in the Solution Architecture document. StoneShare will enable and configure recommended Service Applications and will optionally configure additional Service Applications at the City's request, recording any Installation and configuration steps in the As-Built Guide. This activity is expected to meet the Vendor Requirements listed in RFP section 2.3.3.1 with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> StoneShare assumes that "SharePoint Business Applications" in the RFP refers to SharePoint Service Applications. In order to have good performance in the SharePoint farm, StoneShare recommend enabling only the service applications that are needed as part of the Solution. Recommended Service applications include: App Management service, Application Discovery and Load Balancer service, Managed Metadata service, Search service, Secure Store service, State service, Usage and Health Data Collection service, User Profile service, Enterprise Search service. 			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> StoneShare will test and demonstrate that all configured service applications are working by demonstrating that they start successfully, and the log contains no errors that prevent the service from functioning. The City is responsible for populating the Term Store. This Deliverable requires City staff review and formal acceptance. 			
Logical Architecture Review, Design, and Implementation [Meeting & Staff Review]	<p>StoneShare will review the City's documented short term and long-term goals for the SharePoint Platform and propose a recommended logical architecture to meet these goals in the Solution Architecture document. The logical architecture will include recommended zones, web applications, application pools, accounts and site collection strategy. Upon approval, StoneShare will create the specified logical architecture in SharePoint, this is expected to meet the Vendor Requirements listed in RFP section 2.3.4.1 with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> Site Collections will be created 'blank' to allow for choosing a template later on. StoneShare will implement the Solution architecture which is approved by the City and, which may be different than what is specified in section 2.3.4.1. StoneShare will record the results in the, logical architecture section of the Solution Architecture document. The City will make appropriate subject matter experts available for ad hoc questions and, if necessary, a logical architecture workshop Sites, subsites, lists and libraries will be defined in a separate deliverable This Deliverable requires City staff review and formal acceptance. 			
Implementing Support for Accessibility in SharePoint	<p>StoneShare assumes that the accessibility support in SharePoint 2016 meets the City's needs. SharePoint provides a high-contrast OOTB theme, the ability to add alternate text for links, images and other user-entered content, as well as improvements in readability for screen readers and a hidden accessibility menu. StoneShare will configure the Office theme by default and ensure that such fields as are available for accessibility are populated for the activities that StoneShare performs, but the City is responsible for the content of pages and StoneShare will not create any code or in any way modify the html created by SharePoint to improve accessibility, for instance to meet WCAG 2.0 or 2.1 standards.</p>			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	Assumptions/Constraints <ul style="list-style-type: none"> This is not a deliverable and does not require City review or formal acceptance. 			
Site Collections Hierarchical Structure Design Review and Implementation [Meeting & Staff Review]	<p>Based on experience with other municipalities, StoneShare will propose an example root site, Department Site and Departmental Sub Site and review these with the City SharePoint working group. StoneShare will implement requested configuration changes and save the Department Site and Departmental SubSite as templates that the City can use to create sites in SharePoint, meeting the Vendor Requirements listed in RFP section 2.3.5.1 with the following assumptions:</p> Assumptions/Constraints <ul style="list-style-type: none"> Templates are browser-configuration-only and do not include custom code. Site Templates are subject to the limitations of SharePoint 2016 "Save As Template" feature, including SharePoint publishing features, branding, and navigation configuration. The City will make the working group available for up to a three (3) hour workshop to review the configuration of the templates and request changes. No customization, other than browser-based supported configuration will be performed for any deliverable as part of this project. The working group has full authority to independently decide on the content of the templates. The working group includes the City's Information Manager or Records Manager who can determine the classification of template items according to the City's retention schedule. Sites will use one of the SharePoint out-of-the-box navigation providers, any manual configuration of the navigation will be performed by the City. Branding is limited to choosing an out-of-the-box theme. This Deliverable requires City staff review and formal acceptance. 			
Collaboration Sites and My Sites	<p>StoneShare will create an instance of each documented site according to the approved Logical Architecture, meeting the content database requirement of section 2.3.4.1. StoneShare will configure MySites and the</p>			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
Environments Design Review and Implementation [Meeting & Staff Review]	<p>content type hub as specified in the Vendor Requirements listed in RFP section 2.3.6.1 with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> • The City will provide a list of sites to be created. • The City will provide a definition of up to ten (10) Content types, including columns and templates. • The City Records Manager understands that records in MySites may not be effectively managed and has a policy for use of MySites that is compliant with the City's retention by-law. • The City will not make any changes until the Solution Design document has been approved and the farm configuration, including sites, site templates, content types and the term store have been updated to reflect the approved records management Solution Design. • Sites will be created from the agreed templates; this proposal does not include any post-creation steps. • This proposal does not include any automation of site creation or administration activities. • The City will be responsible for all content in all sites, including images, html, web parts and the content of pages. • This Deliverable requires City staff review and formal acceptance. • This proposal does not include defining or configuring a unique Information Architecture for different departments or teams. • StoneShare will use its own automation tools for creating the sites. 			
Functional Sites Design Review and Implementation [Meeting & Staff Review]	<p>StoneShare will create the two requested site collections, confirming configuration options and as specified in RFP section 2.3.7.1 with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> • The requirement for a quote for On-going as needed SharePoint Administration and Operational support services is met by the description in the Support section of this table combined with the support line items in the pricing document included as part of this proposal. • This Deliverable requires City staff review and formal acceptance. 			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
<p>Enterprise and Departmental Search Scopes Design Review and Implementation [Meeting & Staff Review]</p>	<p>StoneShare will recommend and document a configuration of the search service in the Solution Architecture document based on best practices and the City’s documented requirements. StoneShare will configure the search service application according to the approved Solution Architecture and the requirements as stated in section 2.3.9.1 of the RFP with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> • It is acceptable for the search service to be configured as per the approved Solution Architecture whether that be “two proposed application servers” as mentioned in section 2.4.9.1, one application server in the initial implementation as per the “Desired Initial SharePoint Platform Implementation” in Section 2.3.1 of the RFP or a different recommendation as documented in the Solution Architecture and approved by the City. • StoneShare will configure the search service to index up to ten (10) web sites, whether internal or external, using only the available out-of-the-box configuration, the default relevance and not implementing any special handling or screen-scraping to remove, ignore or otherwise demote irrelevant content such as ads or attempt to modify default extracted thumbnails or other images. • “search scopes” refers to result sources. • This Deliverable requires City staff review and formal acceptance. • Out-of-the-box Search Query and Results pages will be used without modification. • The City will provide the search crawl account with sufficient privileges to crawl the desired File Shares and Web Sites. • Prior to search configuration, the City will have performed a Security Audit of the File Shares and of the Web Sites to be crawled using the crawl account to ensure that no user currently has access to information that they should not be able to see and that the website crawl account does not expose information to any user that they would not otherwise be permitted to see. 			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
Security Concepts Specification and Implementation [Meeting & Staff Review]	<p>StoneShare will document the recommended security configuration in the Solution Architecture document and that as close as possible meets the Vendor Requirements listed in RFP section 2.3.10.1 and, subject to approval by the City, implement the recommended configuration with the following assumptions:</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> • Site Collection Owner and Administrator privileges will be restricted to the designated farm administrator users. • StoneShare may create the permission levels specified in 2.3.10.1 or StoneShare implement an alternate approach for Power Users, and Contributors subject to City approval. • The City may choose from the available out of the box permissions for the Power Users and Members permissions, even though these may not meet the requirements as specified in section 2.3.10.1, specifically, there is no out-of-the-box permission to allow users to delete their own content but <u>not</u> other users' content. StoneShare may be able to recommend an alternate approach after discussion with the City. • The City will be responsible for configuring membership of security groups. • The City will provide a list of Active Directory groups and the permissions they should have on each site. • The City will be responsible for defining and maintaining the Active Directory groups that correspond to SharePoint groups. • The City will be responsible for managing Power Users, their training level and their permission status. 			
RECORDS MANAGEMENT CENTER ENVIRONMENT DESIGN REVIEW AND IMPLEMENTATION				
Records Management Center Environment Design Review	<p>StoneShare will conduct a requirements review session with the City, where the City will present its understanding for how its record management requirements as documented in Section 2.3.8.1 of the RFP can be met with the out-of-the-box records management features of SharePoint 2016 and provide StoneShare with the opportunity to clarify requirements in the context of SharePoint OOTB features. StoneShare will then</p>	I	R+A	Scheduled Session and

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
[Meeting & Staff Review]	<p>propose a design for the Records Management Centre and review the design with the City, documenting the approved design in the System Design document.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare assumes that the Requirements, as stated in the RFP, are complete. • StoneShare assumes that all Requirements are to be met with SharePoint 2016 out-of-the-box (configuration-only) features, without any additional 3rd party products or customization (custom development). • The City have reviewed the available features in SharePoint 2016 and agree that these will meet their needs. • StoneShare assumes by-law 2018-01 resolves to use the TOMRMS classification scheme as-is. • StoneShare assumes the City will accept slight modifications to the standard for the purpose of being able to be implemented using SharePoint out of the box features. • The City do not desire a full review or update of the TOMRMS classification scheme or retention schedule either to modernize the scheme or to make it efficient for implementation in SharePoint. • The solution includes only SharePoint 2016 supported file types. • The City must provide a list of “all other standards and legislation to which the City must adhere” prior to the requirements review session. • The proposed design will meet the stated requirements of 2.3.8.1 to the degree possible using out of the box features of SharePoint 2016 with browser-only configuration. • StoneShare will prepare for and attend one (1) meeting of up to two (2) hours. • Some design decisions may require modification or re-creation of elements of the SharePoint information architecture, including site templates, sites, libraries, content types, columns. This proposal includes up to 20 hours of effort to perform these modifications. • The City will be prepared to answer questions about their Requirements. • The City will ensure that Records requirements stakeholders and subject matter experts are present at this meeting. • The proposal does not include the migration or population of any data. 			MS PowerPoint

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> This activity requires staff review and acceptance. 			
Configuration of Records Management Environment	<p>Using out-of-the-box SharePoint 2016 functionality and, following Microsoft best practices and the approved System Design, StoneShare will implement and configure the SharePoint Records Management Centre. This Records Centre will be compliant with The Ontario Municipal Records Management System (TOMRMS) standard and the City's Classification and Retention By-Law, and all other standards and legislation to which the City must adhere, to the extent possible using the out-of-the-box functionality.</p> <p>StoneShare will implement the City's Retention Schedule in SharePoint according to the approved System Design.</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> The Records Centre and records management functionality will <u>only</u> utilize out-of-the-box SharePoint 2016 functionality. The Solution will be compliant with relevant standards to the extent possible with SharePoint out-of-the-box functionality. As per Addendum #2, Question 8, page 2, the City is comfortable that the functionality provided by SharePoint out-of-the-box will be sufficient to meet their needs. StoneShare will use its own scripting tools for automated provisioning of records management elements. The City must provide a full and fixed file plan and retention schedule for the duration of the project. Any changes to the classification scheme or retention schedule after the project kick-off must be implemented in the production environment after final acceptance of the project, either by the City or as part of the On-going Support activities. 	C+I	R+A	None Required
Acceptance Testing	<p>StoneShare will facilitate the City in performing Acceptance Testing of the records management solution. StoneShare will provide a set of test cases covering the records requirements documented in Section 2.3.8.1 and will create test sites, libraries, classifications and test records for the test. StoneShare will perform an initial quality assurance test in the environment and then facilitate up to two (2) members of the City's project team in executing the acceptance tests. StoneShare will record the results and address any defects prior to the system being declared in Production.</p>	R	A	MS Excel

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	Assumptions/Constraints <ul style="list-style-type: none"> StoneShare will create a test site collection in the production environment that will be used to perform Acceptance Testing according to the agreed test cases StoneShare will use our own format for the test cases and test results. Issues will be managed in an issues list and No changes may be made to the specification until the solution has passed Acceptance Testing. This deliverable requires acceptance by the City. 			
PROJECT DOCUMENTATION REQUIREMENTS				
Solution Architecture Document [Meeting & Staff Review]	<p>StoneShare will provide a Solution Architecture that documents the recommended Logical and Physical Architecture elements of Vendor Requirements listed in Sections 2.3.1 – 2.3.7 and 2.3.9 – 2.3.10 of the RFP. StoneShare will conduct initial information gathering activities in order to be able to propose a logical and physical architecture suitable for the City and will present its recommendations to the City during a Solution Architecture workshop. StoneShare will make any requested changes to the architecture based on feedback from the City and the approved Solution Architecture document will form the specification for StoneShare's installation and configuration activities to meet the remaining Vendor Requirements listed in Sections 2.3.1 – 2.3.7 and 2.3.9 – 2.3.10 of the RFP.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will provide a documented list of their short-term and long-term goals for the SharePoint platform by the kick-off meeting. The City will provision the Physical Infrastructure environment according to the specification in the Architecture document, in the time allotted in the Project Plan. The City will be expected to make their Subject Matter Experts in Exchange, server, network, database and security infrastructure available for up to two (2) two-hour information gathering sessions and for ad hoc questions. 	C	R+A	MS Word

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> The Architecture document will itemize all SharePoint, SQL Server, and Microsoft Office software and licensing that will need to be procured for the installation of the SharePoint 2016 platform. StoneShare will use our own format for this deliverable, to be provided in English. This Deliverable requires City staff review and formal acceptance. 			
System Design Document [Staff Review]	<p>Working with the outcome of the records management requirements review session, StoneShare will provide a System Design Document that describes the agreed way that the out-of-the-box features of SharePoint 2016 will be used to meet the City's stated Records Management requirements as per RFP Section 2.3.8.1.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will ensure that Records Management stakeholders will be available for up to two (2) information gathering sessions, a four (4) hour records management workshop to review the design and for ad hoc questions. StoneShare will use our own format for this deliverable, to be provided in English. This Deliverable requires City staff review and formal acceptance. The design will be restricted to the out-of-the-box features of SharePoint 2016. The City is expected to adopt IT and records management policies that are compatible with the available out-of-the-box features of SharePoint. 	C	R+A	MS Word
System Administrator Guide	<p>As per RFP Section 2.3.11, StoneShare will provide a System Administrator Guide, in MS Word format, that provides the System Administrator with instructions on how to perform ongoing maintenance of the Solution. The System Administrator guide includes references to Microsoft Best Practices for SharePoint Standard Operating Procedures, and Standard Operating Procedures specific to the Solution, which are required over and above Microsoft's published procedures for operating and maintaining SQL Server and SharePoint Server 2016, including Auditing.</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> StoneShare will use our own format for this deliverable, to be provided in English. This Deliverable requires City staff review and formal acceptance. 	I	R+A	MS Word

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
Training Manual	<p>StoneShare will develop customized End User Training materials that provide end users with a detailed understanding of topics that will be covered during Solution training.</p> <p>In addition to the classroom training materials, StoneShare will provide users with an End User Training Manual that details step by step instructions, including screen captures for the tasks covered in the training sessions.</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> StoneShare will use our own format for this deliverable, to be provided in English. This activity does not require acceptance. 	I	R+A	MS Word
As-Built Guide	<p>As per RFP Section 2.3.11, StoneShare will document the configuration of the system in an As-Built Guide that documents, in detail, the installation and configuration of SharePoint 2016. System Administrators can use the guide in future to reference the configuration settings used or as a step-by-step guide to install a new SharePoint environment.</p> <p>Assumptions/Constraints</p> <ul style="list-style-type: none"> StoneShare will use our own format for this deliverable, to be provided in English. This activity does not require acceptance. 	I	R+A	MS Word
TRAINING REQUIREMENTS				
SharePoint Farm Administrator Course	<p>StoneShare will provide a SharePoint Farm Administration course to review the operation and administration of SharePoint. The training will be conducted in English at training facilities in Ottawa, ON. Training provides students with the opportunity to learn to:</p> <ul style="list-style-type: none"> Describe the key features of SharePoint 2016. Design an information architecture for a SharePoint 2016 deployment. Design a logical architecture for a SharePoint 2016 deployment. Design the physical architecture for a SharePoint 2016 deployment. 	I	R+A	Session

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> • Install and configure SharePoint 2016. • Create and configure web applications and site collections. • Plan and configure service applications for a SharePoint 2016 deployment. • Manage users and permissions, and secure content in a SharePoint 2016 deployment. • Configure authentication in a SharePoint 2016 deployment. • Configure platform and farm-level security in a SharePoint 2016 deployment. • Manage information taxonomy in SharePoint web applications and site collections. • Configure and manage user profiles and audiences. • Configure and manage the search experience in SharePoint 2016. • Monitor, maintain, and troubleshoot a SharePoint 2016 deployment. <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • This deliverable does not require formal acceptance or sign-off. • One (1) SharePoint Farm Administrator course of up to five (5) days in length will be provided for up to two (2) IT Staff Members. • Sessions and content are intended for IT staff only. • StoneShare will use our own format for this deliverable. • The City may schedule this class according to the available class schedule. • The attendees are assumed to have knowledge of Windows, IIS, SQL Server, AD and Hyper-V administration, including PowerShell. 			
SharePoint Power User Course	<p>StoneShare will conduct an on-site SharePoint Power User Course suitable for site owners to include site, library and content type configuration. StoneShare will provide custom MS PowerPoint training materials used for the training and conduct a Survey at the end of the session to gather feedback from the participants. Training provides attendees with the opportunity to learn how to:</p> <ul style="list-style-type: none"> • Manage Sites and Site Collections • Add users and groups and manage site, list, folder and item security • Add and configure web parts 	I	R+A	Session

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	<ul style="list-style-type: none"> • Configure site options including theme, title, description and icon • Configure site navigation • View site activity reports • Customize lists and libraries • Configure Check out/in, Content Approval and Versioning • Create and modify pages and web part pages <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • This deliverable does not require formal acceptance or sign-off. • StoneShare will create a dedicated Training site collection in the City’s production environment to support development of training materials. • StoneShare will provide a total of one (1) session of an on-site SharePoint Power User course of up to two (2) days in length. The City may designate up to twenty (20) selected Departmental Staff to attend the session. • The City will provide training facilities, including a presenter laptop and screen, seating, laptops or desktops for all participants, and user ID’s for all attendees with access to the training site. • The proposal does not include additional sessions for additional users or users who cannot make the scheduled date. • The City will ensure that attendees have SharePoint 2016 access, a compatible version of Microsoft Office installed on their computers, and permissions to the SharePoint sites prior to the training session. • The City may record these sessions at its own cost. • StoneShare will use our own format for this deliverable, to be provided in English. • The City shall ensure, in advance, that all required equipment is set up and fully operational in preparation of the session. • The City will provide anticipated ‘black out’ periods at least two (2) weeks in advance, or as soon as possible, of any event requiring advanced scheduling. 			

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
SharePoint End User Training Course	<p>StoneShare will conduct one (1) in person SharePoint End User Classroom Training session to review the operation of the Solution from an End User perspective. The training will be conducted in English, in classrooms provided by the City. StoneShare will provide custom MS PowerPoint training materials used for the training and conduct a Survey at the end of the session to gather feedback from the participants.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> This deliverable does not require formal acceptance or sign-off. StoneShare will prepare and present up to a total of one (1) session of an on-site SharePoint End User course of up to one-half (1/2) day in length for up to 20 selected Departmental Staff. The City will provide training facilities, including a presenter laptop and screen, seating, laptops or desktops for all participants, and user ID's for all attendees with access to the training site. The proposal does not include additional sessions for additional users or users who cannot make the scheduled date. Training will take place at the City in their SharePoint 2016 environment. The City will ensure that End Users have SharePoint 2016 access, a compatible version of Microsoft Office installed on their computers, and permissions to the SharePoint sites prior to the training session. The City may record these sessions at its own cost. StoneShare will use our own format for this deliverable, to be provided in English. The City shall ensure, in advance, that all required equipment is set up and fully operational in preparation of the session. The City will provide anticipated 'black out' periods at least two (2) weeks in advance, or as soon as possible, of any event requiring advanced scheduling. 	I	R+A	MS PowerPoint & Session
Online Accessible Generic End User Training	In addition to the " Training Manual " deliverable, which contains training materials for the End User Training course, Microsoft provides a rich set of SharePoint 2016 training videos and other training content through the Microsoft Office support portal. These videos provide high quality, on-line accessible generic end user training for common SharePoint topics and are included with the City's existing SharePoint or Microsoft Office licensing.	I	R+A	Links to Office Support Site

Project Activity Table

Task/Deliverable	Task/Deliverable Description	The City	StoneShare	Deliverable Format
	Assumptions/Constraints <ul style="list-style-type: none"> StoneShare will provide a link to relevant training videos in the User Guide. The City is responsible for incorporating references to the videos in their other end user help channels. 			
TRANSITION TO SUPPORT				
Ongoing Support	<p>StoneShare will provide the City with a fixed price per month support plan that includes up to eight (8) hours per month for Critical support issues. At the end of the project, the City will be introduced to the Support Team and the process for creating, managing and reporting on support tickets and usage.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Solution Support will be provided by StoneShare's Support Team. The City will coordinate requests for Solution Support through designated and named points of contact. The response time for Critical Support tickets will be four (4) business hours. Business hours are 8:30 am to 5:00 pm ET, Monday-Friday excluding holidays. Support activities performed outside of normal business hours are charged at a rate of 1.5 support hours per hour. The City must designate a primary and a backup point of contact who is allowed to request support on behalf of the City. The City may request support by phone or by email. This activity does not require acceptance. 	C+I	R+A	N/A
Ongoing Support Requirements Time and Material Rate Per Hour	<p>Stone Share will provide critical support, day-to-day ongoing operational support and special project support billed at the Time & Materials rate provided in Appendix B – Rate Form.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Solution Support will be provided by StoneShare's Support Team. Support activities performed outside of normal business hours are charged at a rate of 1.5 support hours per hour. 	C+I	R+A	N/A

The following Activity Table replaces the same section from the Statement of Work.

PROJECT ACTIVITY TABLE				
TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
PROGRAM MANAGEMENT STREAM				
Project Repository Deployment	<p>StoneShare will provide access to an instance of SharePoint Online, to be accessed via a supported SharePoint browser or device, called the Project Repository. The Project Repository will be used to centralize and maintain all Project information (Project Contacts, Calendars, Documents, Lists, Templates, Forms, and Checklists); automate Project processes; and provide a formal mechanism for Project team members to provide feedback.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The Project Repository can be hosted by StoneShare; Individual user access to the Project Repository shall be determined jointly between the City and StoneShare. 	I	R+A	SharePoint Site
Detailed Project Schedule	<p>Working from the proposed Project Schedule, StoneShare and the City will develop a detailed Project Schedule that will detail Project Phases, Acceptance Criteria, Tasks, Responsibilities, Dependencies, Resourcing, and Timelines.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will be responsible for scheduling Internal Resources to contribute in accordance with the Project Schedule; StoneShare will conduct a weekly status meeting of up to one (1) hour to report on progress and answer questions; The Project Schedule will be managed and maintained by StoneShare throughout the Project; Once complete, the Project Plan and Schedule will only be updated in the event of a Change Request. 	C	R+A	MS Project or MS Excel (Project Schedule)

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
Project Management Plan	<p>StoneShare will provide the City with a Project Management Plan describing the Project Methodology, project management practices and how the project will be executed and maintained. The document may include some, or all, of the following, and will be customized after Contract award:</p> <ul style="list-style-type: none"> • Approach • Objectives • Project Schedule • Resource Roles and Responsibilities • Resource Contingency • Communications • Quality Management • Testing and Transition • Training and Coaching • Acceptance Criteria • Support <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare will use our own format for this deliverable, to be provided in English; • This deliverable does not require formal acceptance or sign-off. 	I	R+A	MS Word
Kick-Off Meeting	<p>StoneShare will lead an on-site Project Kick-Off, with a Presentation, for the purposes of meeting the City's Project Team, introducing the engagement and confirming the Scope, Schedule, and Approach to the Project.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare will prepare and attend one (1) meeting of up to two (2) hours; 	I	R+A	MS PowerPoint and Scheduled Session

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City will present the Project Background, applicable User Research, Reference Material, and Examples that form the inspiration for the Project; The City will ensure that the Executive Sponsor, Business User Stakeholders and IT Stakeholders are present at the meeting; The meeting will be scheduled at a mutually acceptable time at least ten (10) days in advance; This Task does not require formal sign-off. 			
Project Status Meetings	<p>StoneShare will prepare for and conduct on-site, weekly Project Status Meetings to report on the overall status of the project, discuss current and upcoming deliverables, highlight risks or issues, identify and review action items, and answer questions. Following each Project Status Meeting, StoneShare will produce and deliver weekly Project Status Reports and post the same to the Project Repository for review.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will conduct weekly Project Status Meetings of up to one (1) hour in length; The City will ensure that project Stakeholders are available and present at each meeting; StoneShare will complete the necessary preparation work, including the production of supporting materials; StoneShare will record all meeting minutes and will use our own format for this activity; StoneShare will post meeting minutes to the Project Repository Site to facilitate the collaborative access of information; This activity does not require acceptance. 	I	R+A	MS Word
Migration Plan	<p>StoneShare will produce a Migration Plan, to include the migration approach, scope, activities, and estimated timelines. The Migration Plan will also describe roles and responsibilities, migration steps and migration automation tools for the City to prepare for, migrate and test each data migration.</p> <p>Assumptions/Constraints:</p>	C	R+A	MS Word

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The Migration Plan will be limited to those elements required for a file share to SharePoint content migration; The City will provide an inventory of all documents to be migrated, including security; The City has identified a Content Owners for each element of the inventory who is empowered to make decisions on behalf of the organizational unit and cleanup of that content; StoneShare will develop the roll-out schedule in coordination with the City's project team; Migration includes documents, and specifically does not include the following: <ul style="list-style-type: none"> Autocad and other Drawing files: ex. Dwg Adobe Illustrator Database files: .db, .mdb, etc. Executable files: exe, dll Web sites or web applications: html, asp, aspx Large videos: sewer videos, etc. Large image libraries StoneShare will use its format for this deliverable; The City will have 3 days to review and approve this deliverable; This deliverable requires formal acceptance or sign-off. 			
INFORMATION TECHNOLOGY STREAM				
Requirements Review	<p>StoneShare will present industry best-practice intranet requirements for an organization of the City's size that leverage SharePoint Online features. StoneShare will also assist the City in choosing a Focus group to review the Document Management functionality.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will prepare and attend one (1) meeting of up to two (2) hours; 	I	R+A	MS PowerPoint

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The Focus Group will use out-of-the-box features of SharePoint Online; Custom development and 3rd party products are out of scope; The City will provide StoneShare with design assets including Logos, Images, News Articles, and Colors at least ten (10) days prior to the meeting; The City will ensure that Stakeholders are present at this meeting; The Document Management Focus Group will consist of one (1) team of up to ten (10) users who will test the Document Management features of the solution such as co-authoring, versioning and sharing; This Deliverable requires formal acceptance. 			
Solution Architecture Document	<p>StoneShare will produce a Solution Architecture document that describes the logical and physical architectures by which the Solution will be implemented to meet the City's stated requirements. This document will also provide guidance on industry best-practices, including backup, availability and disaster recovery.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will ensure that IT stakeholders will be available during this period; The City will meet SharePoint Online pre-requisites according to the specification in the Architecture document, in the time allotted in the Project Plan; StoneShare will conduct one (1) review meeting of up to two (2) hours to review the Solution Architecture; The document will detail all of the logical and physical elements that comprise the Solution, including top-level navigation, hub site architecture, site collection architecture; The City will have 3 business days to review and approve this deliverable; StoneShare will use its own format for this deliverable, to be provided in English; This deliverable requires formal acceptance. 	C	R+A	MS Word

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
TownSquare Configuration	<p>Using its proprietary accelerator (TownSquare), StoneShare will create the initial Intranet configuration in the City's SharePoint Online tenant as a starting point for iterative development. The initial configuration will include: Main Site, Homepage, Top and Left Navigation, as well as:</p> <ul style="list-style-type: none"> • City Branding, including Logos and Color Palettes; • A user friendly, fully searchable Document Library, including titles and keywords; • Internal staff News; • An area for links to internal resources; • A home page; • An site design for a department site; • An area for links to other informational sites, as determined by the City; • External sharing functionality. <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • The SharePoint Online Tenant(s) access has been provided by the City; • The City will provide StoneShare with Global Administrator access for their SharePoint Online Tenant; • The City has properly licensed Focus Group Users; • The Site Design will create a maximum of 3 pages, 3 libraries and 3 custom lists; • Where appropriate, the Site Design will include content types; • The configuration of departmental sites is expected to include manual steps by the City as part of provisioning; • No custom Page Layouts will be created; • Pages will be created by adding Out-of-the-Box Web Parts and pre-configured Page Layouts; • The City will implement SharePoint Online pre-requisites as listed in the Solution Architecture document, including Azure Active Directory configuration; 	I	R+A	-

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> StoneShare will provide up to 10 hours of assistance to support the City in implementing SharePoint Online Pre-Requisites; StoneShare will not modify the HTML produced by SharePoint to alter its level of WCAG 2.0 compliance; StoneShare will ensure that any new HTML created by StoneShare is WCAG 2.0 Level AA Compliant; The City will ensure that IT Stakeholders will be available during this period; StoneShare will migrate up to (50) documents in support of the Focus Group; StoneShare will use only SharePoint Online Out-of-the-Box features; Content is the responsibility of the City; This Task does not require formal acceptance. 			
SharePoint Online Governance Site	<p>StoneShare, in collaboration with the City's project team will define and document, in a Governance Site, the roles and responsibilities required to manage and maintain SharePoint Online on an on-going basis. The Governance Site will hold information such as governance information, training and manuals as well as policies such as naming conventions.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Creation of any policies, directives is considered out-of-scope for StoneShare; Planning or prioritizing the release of applications or functionality is considered out-of-scope for StoneShare; This deliverable requires formal acceptance. 	I	R+A	SharePoint Site
SharePoint Online Administrator Course	<p>StoneShare will provide a SharePoint Online Administrator course to review the operation and administration of SharePoint. The training will be conducted in English at training facilities in Ottawa, ON. Training provides students with the opportunity to learn:</p> <ul style="list-style-type: none"> Introduction to SharePoint Online Work with Site Collections 	I	R+A	Scheduled Session

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> • Manage User Profiles • Manage Business Connectivity Services • Manage the Term Store • Configure Search • Configure Apps • Enterprise Content Management in SharePoint • Manage SharePoint Online Options <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • One (1) SharePoint Farm Administrator course of up to five (5) days in length will be provided for up to two (2) IT Staff Members; • Sessions and content are intended for IT staff only; • The City may schedule this class according to the available class schedule; • The attendees are assumed to have knowledge of Windows, IIS, SQL Server, AD and PowerShell; • This deliverable does not require formal acceptance or sign-off; • StoneShare will use our own format for this deliverable. 			
<p>System Administrator Training and System Administrator Guide</p>	<p>StoneShare will conduct System Administrator Training session to review the operation of the Solution. StoneShare will also provide a System Administrator manual that provides the System Administrator with instructions on how to perform ongoing Solution maintenance.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare will use its own format for this deliverable, to be provided in English; • This deliverable requires formal acceptance. 	I	R+A	<p>Classroom Training and MS Word</p>

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
As-Built Guide	<p>StoneShare will document the configuration of the system in an As-Built Guide that documents, in detail, the installation and configuration of SharePoint Online. System Administrators can use the guide in future to reference the configuration settings used or as a step-by-step guide to configure a new SharePoint environment.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will use our own format for this deliverable, to be provided in English; This activity does not require acceptance. 	I	R+A	MS Word
DOCUMENT MANAGEMENT PILOT GROUP – READINESS PHASE				
OCM Communications	<p>StoneShare will manage the distribution of Organizational Change Management (OCM)-related communications for a Pilot group.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Pilot group to be chosen by StoneShare and not to exceed 10 users; Communications will include email, website and in-person methods; The City will approve all communications prior to distribution; Communications will be limited to Sponsors and Pilot team members; This task does not require formal acceptance or sign-off. 	C	R+A	-
Content Clean-up Workshop	<p>StoneShare will conduct an on-site content clean-up workshop for the Pilot Group to provide the necessary knowledge transfer to enable Content Experts to lead staff through a structured content Clean-up prior to onboarding.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will conduct one (1) content clean up workshops of up to three (3) hours; 	C	R+A	Scheduled Session

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> • Prior to the Workshop, StoneShare will create an 'Archive' file share to separate 'Active' and 'Inactive' content; • The City will ensure that City Records staff and stakeholders will be available during the scheduled training; • The City will provide facilities for the workshop, including laptops for all participants; • The City may record the session at its own cost; • This task does not require formal acceptance. 			
Content Clean-up	<p>With guidance from StoneShare, the City's Pilot Group will complete content clean-up prior to onboarding.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • The City will use StoneShare's prescribed content clean-up approach detailed in the Content Clean-up Workshop; • This task does not require formal acceptance or sign-off. 	R+A	C	-
DOCUMENT MANAGEMENT PILOT GROUP – ONBOARDING PHASE				
Draft Information Architecture	<p>StoneShare will review an inventory of the content to be migrated and draft an Information Architecture for the Pilot group. At this stage, the Information Architecture includes the proposed sites, navigation libraries, security, cases and key metadata columns, in addition to lists of reference terms. StoneShare will review the Draft Information Architecture with the City to develop an initial classification and confirm the structure, which will result in a "records ready" solution. StoneShare will then conduct a review of the draft Information Architecture with the Document Management Focus Group to confirm the vocabulary, structure and security.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • The City has provided an inventory of content and security assignments in a specified format; • The City will provide site assets as requested to enable the creation of fully populated live sites; 	C	R+A	Adobe PDF

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City will confirm and, where necessary, provide lists of reference metadata for tagging documents; The City will provide the File Plan Classification for each of the libraries in the proposed Information Architecture; This task does not require formal sign off. 			
SharePoint Essentials Course	<p>StoneShare will provide the City with online computer-based training (CBT) to walk the City's Pilot users through SharePoint Essentials prior to onboarding.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will only be providing courses the City Pilot users; 	R	A	CBT Training
Staging File Share	<p>StoneShare will create a Staging File Share that reflects the structure and security of the Draft Information Architecture and supports migration staging activities with designated areas for files.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will provide StoneShare with sufficient remote access and privileges to complete this activity; The City will review the security of the Staging File Share. 	C	R+A	Network File Share
Content Reorganization and Classification	<p>StoneShare will facilitate the City's Document Management Focus Group users in staging the content to be migrated. Staging involves selecting the content to migrate and re-organizing content according to the Baseline Information Architecture. StoneShare will introduce the process, tools and timeline, and guide the City in the process of preparing and staging their departmental content.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City has assigned Content Owners prior to StoneShare arriving on-site; The City will provide a laptop for each attendee during the workshops; During the staging and migration process, end-users will access content from the staging location; 	I	R+A	Working Session(s)

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City will be responsible for helping end-users find staged content during prior to migration; The City is responsible for specifying document metadata; The City will be responsible for addressing any content that will not be migrated; This task does not require formal sign off. 			
Initial Content Migration	<p>StoneShare will create the destination SharePoint sites and libraries using assets provided by the City. StoneShare will perform migration according to the migration plan and when tests are error-free, execute the planned content migration to SharePoint Online.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The Information Architecture will not change during migration until after go-live; StoneShare will migrate up to 15,000 documents in total; StoneShare will provide the migration tools; Migration does not include training the City on the use of any migration tools; The City will provide two (2) temporary workstation and one (1) license of Sharegate for migrating content. 	I	R+A	-
Content Migration Validation	<p>StoneShare will apply the final configurations in the City's Production environment. StoneShare will demonstrate the use of the departmental SharePoint Sites for finding, accessing and collaborating on content. StoneShare will facilitate the Pilot Group users in validating that the staged content was migrated as intended and that they are able to find, access and upload their content in the new sites, and that end-users will be successful in using the new sites.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The City will ensure that users will be available during this period; Migration Validation is limited to five (5) individual users; Migration Validation will take approximately three (3) hours to complete; 	R+A	C	MS Excel

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> • Migration Validation will not exceed one (1) business day to complete; • The City will provide StoneShare with Administrator permissions on their SharePoint Online tenant for this activity. 			
SharePoint Power User Course	<p>StoneShare will conduct an on-site SharePoint Power User Course suitable for site owners to include site, library and content type configuration. StoneShare will provide custom MS PowerPoint training materials used for the training and conduct a Survey at the end of the session to gather feedback from the participants. Training provides attendees with the opportunity to learn how to:</p> <ul style="list-style-type: none"> • Manage Sites and Site Collections • Add users and groups and manage site, list, folder and item security • Add and configure web parts • Configure site options including theme, title, description and icon • Configure site navigation • View site activity reports • Customize lists and libraries • Configure Check out/in, Content Approval and Versioning • Create and modify pages and web part pages <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • StoneShare will create a dedicated Training site collection in the City's production environment to support development of training materials; • StoneShare will provide a total of one (1) session of an on-site SharePoint Power User course of up to two (2) days in length. The City may designate up to twenty (20) selected Departmental Staff to attend the session; 	I	R+A	Scheduled Session

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City will provide training facilities, including a presenter laptop and screen, seating, laptops or desktops for all participants, and user ID's for all attendees with access to the training site; The proposal does not include additional sessions for additional users or users who cannot make the scheduled date; The City will ensure that attendees have SharePoint Online access, a compatible version of Microsoft Office installed on their computers, and permissions to the SharePoint sites prior to the training session; The City may record these sessions at its own cost; StoneShare will use our own format for this deliverable, to be provided in English; The City shall ensure, in advance, that all required equipment is set up and fully operational in preparation of the session; The City will provide anticipated 'black out' periods at least two (2) weeks in advance, or as soon as possible, of any event requiring advanced scheduling; This deliverable does not require formal acceptance or sign-off. 			
End User Classroom Training and Guide	<p>StoneShare will deliver on-site End User Training sessions for Document Management Focus Group users, in classrooms provided by the City, to a level that promotes end-user adoption.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will prepare and present one (1) End User Classroom Training sessions of up to three (3) hours in length; StoneShare will provide an End User Training manual; Maximum of fifteen (15) attendees in the session; Sessions will focus on standard operating procedures for end users; The City will provide training facilities, including computers for attendees; Prior to training, the City will ensure that all end-users have SharePoint Online accounts; 	I	R+A	Classroom Training

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City may record these sessions at its own cost; This task does not require formal acceptance. 			
Delta Migration	<p>StoneShare will perform one (1) final migration to migrate any documents that were added or modified in the Staging area since the initial migration.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The staging site structure and Information Architecture will not change during migration until after go-live; The City is responsible for removing access to the staging file share prior to the delta migration and for providing access to the live SharePoint site(s) after the delta migration is complete; This task does not require formal acceptance. 	I	R+A	-
Online Accessible Generic End User Training	<p>In addition to the Training Guide, which contains training materials for the End User Training course, Microsoft provides a rich set of SharePoint Online training videos and other training content through the Microsoft Office support portal. These videos provide high quality, on-line accessible generic end user training for common SharePoint topics and are included with the City's existing SharePoint or Microsoft Office licensing.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will provide a link to relevant training videos in the User Guide; The City is responsible for incorporating references to the videos in their other end user help channels. 			
DOCUMENT MANAGEMENT PILOT GROUP – STABILIZATION PHASE				
Post Go-Live Coaching	<p>StoneShare will provide on-site, on demand over the should coaching to the Pilot Group.</p> <p>Assumptions/Constraints:</p>	C	R+A	-

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> Coaching Sessions will commence upon the completion of End User Training and will continue for up to two (2) business days; This task does not require formal acceptance or sign-off. 			
Ongoing Support	<p>StoneShare will provide the City with a fixed price per month support plan that includes up to eight (8) hours per month for Critical support issues. At the end of the project, the City will be introduced to the Support Team and the process for creating, managing and reporting on support tickets and usage.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Solution Support will be provided by StoneShare's Support Team; The City will coordinate requests for Solution Support through designated and named points of contact; The response time for Critical Support tickets will be four (4) business hours; Business hours are 8:30 am to 5:00 pm ET, Monday-Friday excluding holidays; Support activities performed outside of normal business hours are charged at a rate of 1.5 support hours per hour; The City must designate a primary and a backup point of contact who is allowed to request support on behalf of the City; The City may request support by phone or by email; This activity does not require acceptance. 	C	R+A	-
RECORDS MANAGEMENT ENVIRONMENT DESIGN REVIEW AND IMPLEMENTATION				
Records Management Design Review	StoneShare will conduct a design review session with the City, where StoneShare will present its understanding for how the City's record management requirements can be met with the out-of-the-box records management features of SharePoint Online and provide the City with the opportunity to clarify requirements in the context of	I	R+A	MS PowerPoint and MS PowerPoint

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<p>SharePoint OOTB features. StoneShare will then propose a design for the Records Management Centre and review the design with the City, documenting the approved design in the System Design document.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> • Microsoft will have released hierarchical file plan, and content type mapping for retention labels by this time; • StoneShare assumes that the Requirements, as stated in the RFP, are complete; • StoneShare assumes that all Requirements are to be met to the degree possible with SharePoint Online out-of-the-box (configuration-only) features, without any additional 3rd party products or customization (custom development); • The City understands that SharePoint Online out-of-the-box features may not meet their records management requirements in exactly the way described in the RFP; • The City understand that some records management features of SharePoint Online may be partially released or may not be released at the time of the project and only released features will be included in the records management configuration. Specifically, there is no out-of-the-box management of physical records, automated workflows, assignment of approval authorities, or specific ability to affect security of documents based on records classification; • StoneShare assumes by-law 2018-01 resolves to use the TOMRMS classification scheme as-is; • StoneShare assumes the City will accept slight modifications to the standard for the purpose of being able to be implemented using SharePoint out of the box features; • The City do not desire a full review or update of the TOMRMS classification scheme or retention schedule either to modernize the scheme or to make it efficient for implementation in SharePoint; • The solution includes only SharePoint Online supported file types; • The City must provide a list of “all other standards and legislation to which the City must adhere” prior to the requirements review session; 			

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The proposed design will meet the stated requirements of 2.3.8.1 to the degree possible using out of the box features of SharePoint Online with browser-only configuration; StoneShare will prepare for and attend one (1) meeting of up to two (2) hours; Some design decisions may require modification or re-creation of elements of the SharePoint information architecture, including site templates, sites, libraries, content types, columns. This proposal includes up to 20 hours of effort to perform these modifications; The City will be prepared to answer questions about their Requirements; The City will ensure that Records requirements stakeholders and subject matter experts are present at this meeting; The proposal does not include the migration or population of any data; This activity requires staff review and acceptance. 			
Configuration of Records Management Environment	<p>Using out-of-the-box SharePoint Online functionality and following Microsoft best practices and the approved System Design, StoneShare will implement and configure SharePoint Records Management. This configuration will be compliant with The Ontario Municipal Records Management System (TOMRMS) standard and the City's Classification and Retention By-Law, and all other standards and legislation to which the City must adhere, to the extent possible using the out-of-the-box functionality. StoneShare will implement the City's Retention Schedule in SharePoint according to the approved System Design.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> The records management functionality will only utilize out-of-the-box SharePoint Online functionality. The Solution will be compliant with relevant standards to the extent possible with SharePoint out-of-the-box functionality; As per Addendum #2, Question 8, page 2, the City is comfortable that the functionality provided by SharePoint Online out-of-the-box will be sufficient to meet their needs; 	C+I	R+A	-

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> StoneShare will use its own scripting tools for automated provisioning of records management elements; The City must provide a full and fixed file plan and retention schedule for the duration of the project. Any changes to the classification scheme or retention schedule after the project kick-off must be implemented in the production environment after final acceptance of the project, either by the City or as part of the On-going Support activities. 			
Acceptance Testing	<p>StoneShare will facilitate the City in performing Acceptance Testing of the records management solution. StoneShare will provide a set of test cases covering the records requirements and will create test sites, libraries, classifications and test records for the test. StoneShare will perform an initial quality assurance test in the environment and then facilitate up to two (2) members of the City's project team in executing the acceptance tests. StoneShare will record the results and address any defects prior to the system being declared in Production.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> StoneShare will create a test site collection in the production environment that will be used to perform Acceptance Testing according to the agreed test cases; StoneShare will use our own format for the test cases and test results; Issues will be managed in an issues list; No changes may be made to the specification until the solution has passed Acceptance Testing; This deliverable requires formal acceptance. 	R	A	MS Excel
System Design Document	<p>Working with the outcome of the records management requirements review session, StoneShare will provide a System Design Document that describes the agreed way that the out-of-the-box features of SharePoint Online will be used to meet the City's stated Records Management requirements.</p> <p>Assumptions/Constraints:</p>	I	R+A	MS Word

PROJECT ACTIVITY TABLE

TASK/DELIVERABLE	TASK/DELIVERABLE DESCRIPTION	CUSTOMER	STONESHARE	FORMAT
	<ul style="list-style-type: none"> The City will ensure that Records Management stakeholders will be available for up to two (2) information gathering sessions, a four (4) hour records management workshop to review the design and for ad hoc questions; StoneShare will use our own format for this deliverable, to be provided in English; This Deliverable requires City staff review and formal acceptance; The design will be restricted to the out-of-the-box features of SharePoint Online; The City is expected to adopt IT and records management policies that are compatible with the available out-of-the-box features of SharePoint. 			
TRANSITION TO SUPPORT				
Ongoing Support Requirements Time and Material Rate Per Hour	<p>Stone Share will provide critical support, day-to-day ongoing operational support and special project support billed at the Time & Materials rate provided in Appendix B – Rate Form.</p> <p>Assumptions/Constraints:</p> <ul style="list-style-type: none"> Solution Support will be provided by StoneShare’s Support Team; Support activities performed outside of normal business hours are charged at a rate of 1.5 support hours per hour. 	C+I	R+A	N/A

4. DELIVERABLE MAPPING

The following table maps the deliverables from the previous Statement of Work to the deliverables in this Change Request.

DELIVERABLE MAPPING	
ORIGINAL SOW DELIVERABLE	CHANGE REQUEST DELIVERABLE
PROGRAM MANAGEMENT STREAM	
Project Repository Deployment	Project Repository Deployment
Detailed Project Schedule	Detailed Project Schedule
Project Management Plan	Project Management Plan
Kick-Off Meeting	Kick-Off Meeting
Project Status Meetings	Project Status Meetings
INFORMATION TECHNOLOGY STREAM	
-	Requirements Review
<u>Solution Architecture Document:</u> Physical Architecture Review Design and Implementation Assistance Logical Architecture Review, Design and Implementation Security Concepts Specification and Implementation	<u>Solution Architecture Document:</u> Physical Architecture Design and Implementation Assistance Logical Architecture Design and Implementation Security Concepts Specification and Implementation
SharePoint Installation and Updates	No longer in scope
SharePoint Business Applications Creation and Configuration Implementing Support for Accessibility in SharePoint Site Collections Structure Design Review and Implementation Collaboration Sites and My Sites Environments Design Review and Implementation Functional Sites Design Review and Implementation Enterprise and Departmental Search Result Sources Scopes Design Review and Implementation	<u>TownSquare Configuration:</u> SharePoint Online Platform Configuration Implementing Support for Accessibility in SharePoint Site Collection hub and Site Collection Structure Design and Implementation Collaboration Sites and OneDrive Environments Design Review and Implementation Functional Sites Implementation Enterprise and Departmental Search Result Sources Design Review and Implementation
-	SharePoint Online Governance Site
SharePoint Farm Administrator Course	SharePoint Online Administrator Course

DELIVERABLE MAPPING	
System Administrator Guide	System Administrator Training and Guide
As-Built Guide	As-Built Guide
DOCUMENT MANAGEMENT PILOT GROUP – READINESS PHASE	
-	OCM Communications
-	Content Clean-up Workshop
-	Content Clean-up
DOCUMENT MANAGEMENT PILOT GROUP – ONBOARDING PHASE	
-	Draft Information Architecture
-	SharePoint Essentials Course (CBT)
-	Staging File Share
-	Content Reorganization and Classification
-	Initial Content Migration
-	Content Migration Validation
SharePoint Power User Course	SharePoint Power User Course
SharePoint End User Training Course Training Manual	End User Classroom Training and Guide
-	Delta Migration
Online Accessible Generic End User Training	Online Accessible Generic End User Training
DOCUMENT MANAGEMENT PILOT GROUP – STABILIZATION PHASE	
-	Post Go-Live Coaching
Ongoing Support	Ongoing Support
RECORDS MANAGEMENT ENVIRONMENT DESIGN REVIEW AND IMPLEMENTATION	
Records Management Design Review	Records Management Design Review
Configuration of Records Management Environment	Configuration of Records Management Environment
Acceptance Testing	Acceptance Testing
System Design Document	System Design Document
TRANSITION TO SUPPORT	
Ongoing Support Requirements Time and Material Rate Per Hour	Ongoing Support Requirements Time and Material Rate Per Hour

5. PROJECT TIMELINE

Below is a high-level project plan, outlining the project phases and estimated timeline. The activities outlined in this Change Request will take approximately 15 weeks to complete.

SHAREPOINT DOCUMENT AND RECORDS MANAGEMENT INTRANET		
	Start	Finish
PROGRAM MANAGEMENT STREAM		
<ul style="list-style-type: none"> Project Repository Deployment Detailed Project Schedule Project Management Plan Kick-off Meeting Migration Plan 	Week 1	Week 2
INFORMATION TECHNOLOGY STREAM		
<ul style="list-style-type: none"> Requirements Review Solution Architecture Document Townsquare Configuration SharePoint Online Governance Site SharePoint Online Administrator Course System Administrator Training and Guide As-Built Guide 	Week 3	Week 6
DOCUMENT MANAGEMENT PILOT GROUP – READINESS PHASE		
<ul style="list-style-type: none"> OCM Communications Content Cleanup Workshop Content Clean-up 	Week 7	Week 8
DOCUMENT MANAGEMENT PILOT GROUP – ONBOARDING PHASE		
<ul style="list-style-type: none"> Draft Information Architecture SharePoint Essentials Course (CBT) Staging File Share Content Reorganization and Classification Initial Content Migration Content Migration Validation SharePoint Power User Course End User Classroom Training and Guide 	Week 9	Week 11

SHAREPOINT DOCUMENT AND RECORDS MANAGEMENT INTRANET		
<ul style="list-style-type: none"> Delta Migration Online Accessible Generic End User Training 		
DOCUMENT MANAGEMENT PILOT GROUP – STABILIZATION PHASE		
<ul style="list-style-type: none"> Post Go-Live Coaching Ongoing Support 	Week 12	Week 12
RECORDS MANAGEMENT ENVIRONMENT DESIGN REVIEW AND IMPLEMENTATION		
<ul style="list-style-type: none"> Records Management Center Environment Design Review Configuration of Records Management Environment Acceptance Testing System Design Document 	Week 12	Week 15
TRANSITION TO SUPPORT		
<ul style="list-style-type: none"> Ongoing Support Requirements Time and Material Rate per Hour 	Ad Hoc	Ad Hoc

6. BILLING SCHEDULE

The above noted work will be completed on a fixed price basis. The fixed price is **\$171,450.00**.

Below is the billing schedule from the previous Statement of Work.

	Service Description ¹	Price
15	Project Kick-Off	\$7,500.00
16	Detailed Project Plan and Schedule	\$3,500.00
1	Physical Architecture Review and Implementation Assistance	\$3,000.00
2	SharePoint Installation and Updates	\$3,000.00
3	SharePoint Business Applications Creation and Configuration	\$4,500.00
4	Logical Architecture Review, Design, and Implementation	\$2,000.00
5	Implementing Support for Accessibility in SharePoint	\$0.00
6	Site Collections Hierarchical Structure Design Review and Implementation	\$4,500.00
7	Collaboration Sites and My Sites Environments Design Review and Implementation	\$4,500.00
8	Functional Sites Design Review and Implementation	\$500.00
9	Records Management Center Environment Design Review and Implementation	\$60,000.00
9.1	Records Management Center Environment Design Review	\$18,000.00
9.2	Configuration of Records Management Center Environment	\$15,000.00
9.3	Acceptance Testing	\$27,000.00
10	Enterprise and Departmental Search Scopes Design Review and Implementation	\$2,500.00
11	Security Concepts Specification and Implementation Requirements	\$2,000.00
12	Project Documentation Requirements Total	\$39,000.00
12.1	As-Built Guide	\$3,000.00
12.2	Project Management Plan	\$2,500.00
12.3	Solution Architecture Document	\$10,000.00
12.4	System Administrator Guide	\$11,000.00
12.5	System Design Document	\$6,500
12.6	Training Manual	\$6,000
13	Training Requirements	\$34,950.00
13.1	4-day Commercial SharePoint Farm Administrator Course	\$5,950.00
13.2	2-day Custom SharePoint Power User Course	\$18,000.00
13.3	0.5 day Custom SharePoint End User Training Course	\$11,000.00
13.4	Online Accessible Generic End User Training	\$0.00
14a	Ongoing Support Requirements Fixed Monthly	\$1,200.00
14b	Ongoing Support Requirements Time and Material Rate Per Hour	\$150.00

The billing schedule below replaces the same section from the previous Statement of Work.

BILLING SCHEDULE			
INVOICE#	PROJECT MILESTONE	ESTIMATED BILLING	FEES (\$)
1	Program Management Stream	Week 2	\$15,000.00
2	Information Technology Stream – Solution Architecture	Week 4	\$35,000.00
3	Information Technology Stream – TownSquare Configuration	Week 6	\$46,000.00
4	Document Management Pilot Group – Readiness Phase	Week 9	\$2,550.00
5	Document Management Pilot Group – Onboarding Phase	Week 11	\$10,400.00
6	Document Management Pilot Group – Stabilization Phase	Week 12	\$2,500.00
7	Records Management Center Environment Design Review and Implementation	Week 15	\$60,000.00
SUB TOTAL			\$171,450.00

Pricing Assumptions:

- Prices are quoted in CAD dollars and are exclusive of taxes.
- Invoices are due 30 days from receipt.

7. ACCEPTANCE

STONESHARE INC.		CITY OF CLARENCE-ROCKLAND	
Signatory		Signatory	
Name		Name	
Title		Title	
Date		Date	