



**MILESTONE**  
UTILITY SERVICES

**A Milestone Utility Services, Inc.**

**Proposal  
For  
City of Columbus**

**Annual Maintenance & Support Services for the Inbound / Outbound  
Collector Tables and Appointment Window Interface between  
PragmaCAD and Banner/Customer Suite CIS**



***April 5, 2018***

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Mr. Chris Jackson  
Project Manager  
Department of Technology  
City of Columbus  
The Jerry Hammond Center  
1111 East Broad Street, Suite 301A  
Columbus, Ohio 43205

Re: Renewal of One Year/120 Hours Maintenance and Support Services for Inbound/Outbound Collector Tables and Appointment Window Interface between PragmaCAD and Banner/Customer Suite Release 4.1

Dear Mr. Jackson,

Thank you for the opportunity to renew support services. Milestone Utility Services, Inc. is pleased to submit our proposal to provide maintenance and support services for the Inbound / Outbound Collector Tables and Appointment Window Interface between PragmaCAD and Customer Suite Release 4.1 CIS. Our unique understanding of the interface created by Milestone Utility Services, Inc. and the day-to-day opportunities and challenges of the utility environment, along with the constantly changing face of technology and business requirements makes Milestone Utility Services, Inc. the right partnership with City of Columbus and the right choice for Professional Services to maintain and support the Appointment Window Interface.

Milestone Utility Services, Inc. (Milestone) has become a well-known and respected name in the Hansen Customer Suite consulting business. As the Utility market grows and changes, Milestone has grown and expanded its services. Milestone works with some of the Harris CIS products, and has partnered with companies like Oracle and SAP, offering professional services and support for Oracle's CIS, Customer Care & Billing; and SAP's CIS solution, Customer Relationship Management and Billing (CRM&B).

Milestone offers a full range of services from Project Management Office, System Integration, Data Conversions to the designing and development of integrations and interfaces like the one built for City of Columbus. From DBAs to Quality Assurance resources, and Rate Analyst, Milestone can provide the expertise needed by the Utility and Energy industry. Milestone's quality of work and team of experts has resulted in long-term relationships with Hansen Banner/Customer Suite users such as ONE Gas, Vectren Energy and other CIS users.

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In accordance with the guidance and information you have provided:

This offer is made on behalf of:  
Milestone Utility Services, Inc.  
11830 NW 4th Street  
Plantation, Florida 33325

The designated Primary Point of Contact for this bid is:

Jennifer Espelien  
Sales & Marketing  
Milestone Utility Services, Inc  
949-294-4572  
[jespelien@musiusa.com](mailto:jespelien@musiusa.com)

Milestone's Authorized Agent for this offer is:  
Ram Kasarla  
President and CEO

This offer will remain valid until September 30, 2018.

We would like to be considered as your solution provider and trusted advisors for the on-going maintenance and support of the Inbound /Outbound Collector Tables and Appointment Window Interface between PragmaCAD and Banner/Customer Suite. Milestone is committed to the success of your business and will work hard to ensure that this and all projects run smoothly and that all parties feel that their thoughts and methods were respected throughout the process. When your project succeeds, we succeed, and that guiding principle makes us the best at our business. Our team welcomes the opportunity to discuss our proposal with you and your team.

Respectfully,



Ram Kasarla  
President & CEO

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## Section 1: Executive Summary

We appreciate and value our partnership with City of Columbus. This proposal was prepared at the request of City of Columbus to renew support services. City of Columbus has implemented PragmaCAD. Milestone Utility Services, Inc. was hired to design and build the Appointment Window Interface between PragmaCAD and Banner/Customer Suite CIS Release 4.1. Additionally, the City is using the existing Banner Service Order functionality to interface with PCAD for service order data. Milestone will provide support for Service Order related issues inside of Banner related to mobile order processing.

There will be no increase in costs. Milestone is pleased to be able to keep the cost and hours the same as last year's contract. This one year maintenance and support services contract includes 120 hours of services and will provide 24 x 7 on demand support services for the Inbound/Outbound Collector Tables and Appointment Window Interface between PragmaCAD and 4.1 Banner/Customer Suite CIS for City of Columbus after go-live of the PragmaCAD implementation project. There will be a dedicated resource from Milestone for City of Columbus to log issues with. The pricing includes a bucket of hours to support the Inbound/Outbound Collector Tables and Appointment Window Interface. A dedicated resource team is assigned to City of Columbus and will work with the City of Columbus team to prioritize, respond, log and work the issues.

Milestone has been providing comprehensive maintenance and support services to many of the original Banner customers since 2002 when Milestone was established.

- **The Right Company** – Milestone Utility Services, Inc. is focused on the utility industry and has been developing solutions for the utility industry for over 15 years and many of the employees have more than 25 years of experience with Banner.
- **The Right Team** – Milestone is pleased to provide a strong team of resources who are uniquely chosen based on their experience consulting, implementing, and operating utility industry applications. Our projected resource team is one that, we feel, realizes the criticality of the success of all projects and daily operations, as well as the importance of City of Columbus's budget, timeline, and existing operations.
- **The Right Methodology** – Milestone will leverage our proven maintenance and support implementation methodology to implement the proposed solution. Our methodology mitigates risk by utilizing best practices and outcomes through knowledge gained from following the same processes over and over again and gauging the results.

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## Benefits of Using Milestone:

- **Market Share, Integrity, and Customer Satisfaction** -- Milestone Utility Services, Inc. is proud to be celebrating sixteen years in business and continuing to grow. We attribute our growth and success to our customers continued loyalty and the expertise of our employees in the utility CIS market. Milestone has successfully completed full scale utility CIS implementations along with numerous targeted project implementations and 4.x upgrades. All with 100% client satisfaction.
- **Value and Flexibility** – Milestone Utility Services, Inc. provides a low cost option with the highest quality professional resources. Our consultants average over 25 years of utility industry knowledge and are recognized by our customers as superior and award winning consultants that are integral to their success. We, at Milestone, understand that all customers are not alike, nor have the same needs.
- **Customer Suite Product and Industry Knowledge and Expertise** -- Milestone. prevails as the professional services provider to a majority of the original Banner customers. Milestone's product knowledge and expertise remain current through the services supported and provided to these customers through upgrade services, resolving defects and providing corrections, developing modifications, and enhancements. Our industry knowledge grows as our customers engage our team on projects such as meter projects, rate modifications, service order dispatch enhancements, multi streaming long running batch jobs, and technology upgrades.

At Milestone, we define success more broadly than simply the delivery of services and implementation of software. It is our mission that our customers obtain their business and performance goals. To that end, we are committed to working with City of Columbus and their teams to successfully achieve desired business goals.

It is our belief that Milestone Utility Services can provide City of Columbus with a variety of services in support of this effort. We have expert functional, technical, and utility and energy industry knowledge that insures a smooth and successful low-cost approach to CIS maintenance and ongoing support.

Our significant experience with long-term maintenance of Banner/Customer Suite for numerous Banner/Customer Suite customers ensures this is a low cost, low risk option.

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## Section 2 - Maintenance Support and Services for Inbound/Outbound Collector Tables and Appointment Window Interface between PragmaCAD and Banner/Customer Suite

### Level of Support

Milestone provides a dedicated point of contact on a 24 x 7 basis to log issues with; and a dedicated team of resources to assist with Service Order related issues inside of Banner related to mobile order processing, and Appointment Window Interface between PragmaCAD and Banner/Customer Suite Release 4.1 system. The resources will include DBA's, Functional Analysts, Technical Analysts, etc. Milestone then triages and fixes production problems.

There is a bucket of 120 hours that can be used to support and maintain the Inbound/Outbound Collector Tables and Appointment Window Interface. If for some reason Columbus should exceed the allotted bucket of hours during this support term Milestone will bill a blended hourly rate of \$135 per hour.

**NOTE: If Milestone should not meet the turnaround time for "Priority 1 and Priority 2" issues no hours will be deducted from the bucket of hours for the response.**

### Priority Support

Milestone provides the response times indicated in the table below. Priority indicates the level of criticality of the error/defect. In providing the Services, Milestone shall prioritize and complete the Services, for each component Service requested, by the Time for First Correction and, if needed, the Time for Final Correction, as denoted below.

Priority/Severity	Time for First Correction	Time for Final Correction
Priority 1-Severity 1	Eight (8) business hours	Ten (10) days
Priority 1-Severity 2	Eight (8) business hours	Thirty (30) days
Priority 1-Severity 3	Twenty-four (24) business hours	Three (3) months
Priority 2	Thirty (30) days	120 days; if error time critical, Priority 1-appropriate severity level applies
Priority 3	No deadline/correction as possible	No deadline/correction as possible

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“Time for First Correction” is the total time between notice of an error/defect and the introduction of at least a temporary fix for the error/defect, if not the permanent fix.

“Time for Final Correction” is the total time between notice of an error/defect and the completion of a permanent fix for the error/defect.

“Priority 1-Severity 1” means an error such that the Software is not functioning; and Customer is unable to bill its customers.

“Priority 1-Severity 2” means an error in a time sensitive or mission critical function, e.g. payment application not operable, inability to perform budget billing, or an error precluding operation of the charge calculation process, or an error in the batch process function, e.g. inability to run the nightly batch window.

“Priority 1-Severity 3” means an error rendering mission critical applications partially inoperable, e.g. some accounts not completing billing, or inability to complete budget billing for some accounts.

“Priority 2” means an error that is not time critical, e.g. bad debt function not working, monthly GL feed not working.

“Priority 3” means an error that is cosmetic and not related to an important function, e.g. error in documentation, error in on-line help function.

## **Assumptions:**

1. City of Columbus has ownership of all source code for their current Banner installment; additionally City of Columbus owns production runtime licenses for any compilers or development tools used in the source code development of the Banner application and these licenses are not contingent on City of Columbus’s relationship with a software vendor.
2. City of Columbus will provide a development environment with data recently cloned from Production. Milestone will develop corrections and enhancements in this development environment, and therefore will need complete access to apply forms, processes and database objects.
3. City of Columbus will provide Milestone with remote access to any Banner or Customer Suite development environment to be supported by Milestone. This includes the front end application, as well as the servers and database. Milestone will be able to access and utilize other applications such as document repositories, defect tracking, log/lis file viewers, etc.
4. City of Columbus provides project team with knowledge of current installation and business processes (or access to them) for the Appointment Window Interface between PragmaCAD and City of Columbus Banner/Customer Suite 4.1.
5. Since Milestone did not build the interface between the Collector Tables and PragmaCAD, Milestone assumes CGI will be supporting the interface between the Collector Tables and PragmaCAD and from PragmaCAD to the Collector Tables.

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## Methodology

Milestone is pleased to provide City of Columbus with Maintenance and Support of the Banner/Customer Suite application as an alternative to the software vendor.

The following are a list of the types of support feature services provided by our consultants for the Appointment Window Interface:

- production system issue triage
- logging and tracking reported defects and issues
- prioritization, management and reporting the disposition of all defects and issues
- perform defect and issue analysis and triage to resolution point
- prepare defect correction documentation for technical staff
- code correction of defects
- unit testing of defects
- versioning of all defect code corrections
- package and deliver code corrections
- maintain current version of source code utilizing 3rd party management tool
- ensure database and system performance through Database Administration Services
- provide ad hoc report services and interface support

City of Columbus will have an assigned team to work the issues turned in by the client.



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## Section 3 – Pricing Information

### Fee Summary

#### 1 Year/120 Hours of Maintenance Support and Services for Inbound / Outbound Collector Tables and Appointment Window Interface

Base Price of \$17,000 for maintenance and support to resolve any issues related to:

- Inbound/Outbound Collector Tables
- Appointment Window Interface between PragmaCAD and 4.1 Banner/Customer Suite CIS (built by Milestone Utility Services, Inc.)
- Service Order related issues inside of Banner related to mobile order processing.

This pricing includes 120 hours to be used by City of Columbus for the services. An invoice for the full amount will be sent when the contract executed. The rate for services exceeding the allotted 120 hours will be billed monthly at a blended rate of \$135 per hour.

Maintenance Term	Base Cost Per Year
1 Year or 120 Hours	\$17,000

### Annual Maintenance and Support Term

The Maintenance and Support term includes 120 hours to be used 9/21/2018- 9/20/2019.

### Base Price Services

The fee(s) for this Service is exclusive of expenses and taxes.

### Monthly Reporting

An invoice for the full amount will be sent to the City when the contract executed. Milestone will provide City of Columbus with a monthly statement showing how the hours are spent against the bucket of 120 hours allotted so a full accounting of the work is transparent to City of Columbus.

In addition, Milestone will invoice Columbus monthly for any travel expenses for the previous month.

Expenses invoicing will show expense purpose, receipt copies, and the consultant submitting the expense.

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## **Travel Expenses**

Travel & Living expenses are not included in the annual maintenance cost and will be billed as incurred. Travel is not usually required, and always preapproved by customer before travel is booked.

## **Payment Term**

The payment term for invoicing is Net 30 Days.