ATTACHMENT A

CITY OF AUSTIN/INCUMBENT CONTRACTOR TRANSITION PLAN

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1. PURPOSE

This plan formally documents the process for the transition of the powers, duties, activities, and function for the services under from _____(contract number) to a new Contractor awarded to perform these services. The City of Austin contract is for Beneficial Reuse of Biosolids for Austin Water. This contract is currently with _____ Incumbent Contractor and the tranisiton to the new Contractor shall be completed no later than 120 days prior to contract expiration. The period of transistion is from _____ to _____.

2. TRANSITION APPROACH

For this transition, Incumbent Contractor shall maintain its existing staff on-site throughout the transition period. No additional staffing requirements are anticipated to complete the transition. Immediately prior to the transition, Incumbent Contractor shall set up its transition team in order to facilitate the activities necessary for successful transition. The new Contractor will have its staff on site the first day of the transition period and will establish a similar team to work with Incumbent Contractor to coordinate the contract transition. The City of Austin will provide adequate workspace for both contractors throughout the duration of the transition. The City of Austin will also designate a Transition Project Manager to work with both Contractors throughout the transition period. The Transition Project Manager will be _____ and can be contacted at _____ (phone) or _____ (email).

3. TRANSITION TEAM ORGANIZATION

The following chart illustrates the transition team members from the City of Austin, Incumbent Contractor, and the new Contractor as well as the roles and responsibilities of each team member.

Organization	Title	Name	Roles/Responsibilities
City of Austin	Transition Project Manager		Coordinate activities between contractors throughout transition; provide workspace for all transition staff; facilitate transition meetings as required
City of Austin	Contract Manager		Responsible for overseeing all contract actions and deliverables; responsible for ensuring accountability on all funding and budget items pertaining to the contract
Incumbent Contractor	Transition Lead		Work with the City of Austin and Future Contractor managers and leads to coordinate and schedule all transition activities; provide weekly reporting on transition progress; ensure all applicable property and tools are included as part of transition
Incumbent Contractor	Transition Manager		Ensure all activities are completed during transition; document all processes, tasks, and activities for transition to Future Contractor; ensure all training documentation is complete; ensure completion of user and technical manuals and processes; ensure all documentation is in accordance with the City of Austin standards; ensure proprietary materials are not part of transition
New Contractor	Transition Lead		Work with the City of Austin and Incumbent Contractor managers and leads; ensure all transition deliverables are received and understood; identify any gaps in transition activities
New Contractor	Transition Manager		Ensure continuity of all activities throughout transition; ensure receipt of adequate documentation of all processes, tasks, and activities; ensure all training documentation received addresses all planned training items; ensure standardization of all transitioned documentation

4. WORKFORCE TRANSITION

For this transition, all workforce members shall remain with their current organization. The Incumbent Contractor workforce shall remain on-site to perform their transition activities until such time that the transition is completed and approved by all parties. The new contractor shall ensure its workforce is on site until transition completion. This will allow adequate time to perform all transition activities. The City of Austin will provide any additional temporary workspace needed for the new Contractor employees until transition completion, at which time the workforce will occupy the vacated locations of the outgoing Incumbent Contractor workforce.

5. WORK EXECUTION DURING TRANSITION

Throughout the transition phase, work shall continue to be performed by Incumbent Contractor in accordance with the current contract. The transition management team shall ensure that the new Contractor's employees work alongside Incumbent Contractor counterparts; however, Incumbent Contractor shall maintain all responsibility for tasks and deliverables. At the end of the transition period or the award of the new contract with the new Contractor (whichever happens first), and upon transition approval, the new Contractor shall assume full responsibility for all tasks and deliverables.

6. PROPERTY TRANSITION

6.1. City Furnished Property and Controls

As part of this transition, all City furnished property provided to Incumbent Contractor
under the current City of Austin Services contract shall be turned in to the City upon completion and approval of the transition phase. This includes all facility and access keys, ID badges, tools, equipment, and controls. A listing of City furnished property equipment and tools are listed in Exhibit A (City Furnished Property).

6.2. Incumbent Contractor Owned Property

All incumbent owned equipment shall remain with Incumbent Contractor upon completion and approval of the transition.

7. KNOWLEDGE TRANSFER

For this transition, knowledge transfer shall occur over the entirety of the 120 day transition period. The knowledge transfer shall take place via various methods. Incumbent Contractor's Transition Manager shall coordinate transitions sessions that focus on the specific functionality, activities, and concerns related to the City of Austin Beneficial Reuse of Biosolids services and operation management. These sessions shall be completed no later than 60 calendar days prior to the end of the transition period. Additionally, the new Contractor's staff will work alongside their Incumbent Contractor counterparts throughout the 120 day period in order to gain familiarity with the equipment, software, tools, processes, and organizational assets. The Transition Managers from Incumbent Contractor, the new Contractor, and the City of Austin shall meet no later than 30 calendar days prior to transition completion in order to determine if any further training or knowledge transfer is required.

8. SCHEDULE

The Incumbent Contractor's Transition Manager shall develop a schedule and associated tasks for transitioning all services under their contract to the new Contractor. The schedule

with outlined tasks and any changes to this schedule will require review and approval from the City of Austin Transition Project Manager.

9. HANDOVER AND ACCEPTANCE

The City of Austin will make the determination of when transition is completed and will provide formal acceptance indicating such. To do this, the City of Austin's Transition Project Manager will utilize the established transition checklist in Exhibit B in order to determine that all activities associated with the transition have been completed. The City of Austin's Transition Project Manager will also meet with or contact the Transition Managers from Incumbent Contractor and the new Contractor to ensure that all concerns and issues have been met and addressed appropriately. Once the City of Austin's Transition Project Manager has formally accepted the transition as complete, the checklist and supporting documentation will be signed and accepted by the City of Austin's Transition Project Manager and will be sent to the City of Austin's Purchasing Office to upload to the current contract file. It is only after all of these approvals and signatures are in place that the transition will be considered complete.

EXHIBIT A

City Furnished Property List

EQUIPMENT & TOOLS DESCRIPTION	COMMENTS

EXHIBIT B

City of Austin/Incumbent Contractor Transition Checklist

	CHECKLIST	COMMENTS/NOTES
☐	All furnished tools and equipment listed on Exhibit A returned.	
☐	Facility and access keys and ID badges turned in.	
☐	Incumbent Contractor conducted transition sessions that focused on the specific functionality, activities, and concerns with the new Contractor.	
☐	The Transition Managers from Incumbent Contractor, the new Contractor, and the City of Austin met at least 30 calendar days prior to transition completion to determine if any further training or knowledge transfer is required.	
☐	City of Austin's Transition Project Manager has formally accepted the transition as complete by signing this checklist below.	
☐	City of Austin's Transition Project Manager sent the City of Austin's Purchasing Office this document to upload to the current contract file.	

TRANSITION COMPLETE & APPROVED BY:

_____

City of Austin Transition Project Manager Signature

_____ _____

City of Austin Transition Project Manager Printed Name & Title Date