



STEPS Online Collaborative Research Community Proposal

Appendix A: Statement of Work

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Petroleum Technology Research Centre Inc. (PTRC)

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Reference Number: **PTRC SOW 001**

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I. SERVICES DESCRIPTION

This Statement of Work forms part of the Services Agreement between CLIMBIT and PTRC made effective February 10, 2011 (the "Contract"). All capitalized and undefined terms in this Statement of Work shall have the same meaning as in the Contract.

I.1 SERVICE OVERVIEW

CLIMBIT will support the STEPS Online Collaborative Research Community by providing an online service for their community collaboration efforts. The scope of this support includes the hosting, maintenance, licensing and management of all servers, application servers, databases and solution applications as they pertain to the STEPS Community.

- a) Virtual Server Windows Administration
Virtual Server Windows Administration is offered on a per virtual server basis and includes antivirus with the following services:
- b) Basic Monitoring
CLIMBIT will perform basic ping monitoring of the client's virtual server and notify the client by e-mail to PTRC designated administrator if the virtual server is not responding to a target service level of 99.9% availability over a 4 hour monitoring interval.
- c) Operating System Patching and Maintenance
The CLIMBIT technical staff will apply all vendor-suggested patches to the operating system in the client's virtual server within 30 days of their release. CLIMBIT will give notice to the client's technical contacts that maintenance for patching and other routine servicing will be scheduled during the CLIMBIT maintenance window, which is scheduled every Sunday at 11 p.m. Eastern Time, unless the client notifies CLIMBIT not to proceed with the scheduled maintenance or to change the maintenance window. CLIMBIT will proceed with the scheduled maintenance at the time indicated. Note: This service is included by default on all Windows servers to ensure vendor-suggested patches for security threats and other fixes are applied during the maintenance windows.
- d) Microsoft SQL Server Administration
Over and above the Virtual Server Windows Administration, Microsoft SQL Server Administration includes the following:
- e) Configuration and Verification of Microsoft SQL
A dedicated Microsoft SQL server software will be installed and configured. CLIMBIT will apply current vendor maintenance patches at the time of software installation.
- f) Monitoring of Database Services
CLIMBIT will monitor Microsoft SQL services to check for service availability.
- g) Microsoft SQL Patches and Service Packs
CLIMBIT will check for patches and service packs on an ongoing basis and will apply them proactively for security vulnerabilities and functional deficiencies.
- h) Microsoft Application Server Administration
Over and above the Virtual Server Windows Administration and Microsoft SQL Server Administration, CLIMBIT will maintain the Microsoft SharePoint and Project Portfolio Server software on behalf of the client. This includes applying vendor suggested patches, service monitoring, security maintenance, performance monitoring, backup-recovery, production-staging-development environment management, connectivity and anti-virus protection.

1.2 SOLUTION RESPONSIBILITIES

CLIMBIT shall:

- i) Supply, house, power, and maintain the hardware, data centre infrastructure, and Internet connectivity.
- j) Supply, house, power, and maintain the hardware, data centre infrastructure, and Internet connectivities and functional deficiencies.
- k) Apply all appropriate upgrades and patches to the infrastructure software (VMware, SharePoint, Windows Servers, SQL Servers), including any patches and upgrades requested by PTRC.
- l) Resolve all problems with the virtual servers to the satisfaction of PTRC. This responsibility extends to CLIMBIT contacting the infrastructure vendors to identify and resolve virtualization issues. It also extends to resolving operating system, application-level issues to the satisfaction of PTRC and any end-user support requested by PTRC.
- m) Obtain licenses for all software provided and supported by it on the virtual server sufficient for PTRC to be able to use it in connection with this SOW and the Contract.

PTRC shall:

- a) Be responsible for any client-installed software. CLIMBIT reserves the right to charge, on a per hour basis, for modifications and maintenance to the virtual server and operating system as a result of client-installed software at the rate set out in Appendix B to the Services Agreement between the parties and subject to CLIMBIT providing a budget for such services and PTRC providing a written pre-authorization for a budgeted amount executed by the Executive Director of PTRC. Be responsible for the development, operation, and maintenance of the its applications and Web site.
- b) If a virtual server is used for a publicly accessible Web site or an online service of any sort, be responsible for any products or services and all content and materials appearing online or incorporated into the client's products and services, including without limitation (a) the accuracy and appropriateness of content and materials appearing within the Web site or related to the client's products and services, (b) ensuring that the content and materials appearing within the Web site or related to the client's products and services do not violate or infringe upon the rights of any third party, and (c) ensuring that the content and materials appearing within the Web site or related to the client's products and services are not libellous. The client shall also be solely responsible for accepting, processing, filling, and billing any orders, and handling any inquiries or complaints arising from public access to the virtual server.
- d) Be responsible for the effects of any security policy it implements on its Server Solution.
- e) Designate up to two (2) technical administrators ("tech admins"). These tech admins and only these tech admins are authorized to contact CLIMBIT technical support.
- f) Abide by the requirements of the CLIMBIT Acceptable Use Policy as defined in Annex 6 of this Statement of Work.

1.3 SERVICE AVAILABILITY AND PERFORMANCE

Service Availability

- a) Availability is defined as each virtual server:
 - i) Is running as determined by VMware's vCenter™ Manager as the amount of time in which the server is available over a one month period.
 - ii) Having access to both the SAN and to the Internet at the following services levels.
 - a. 1 Mbps monthly bandwidth commitment calculated at the 95th percentile to account for spikes.
 - b. Facility: network availability
 - c. Cross-connects to meet-me room, 1,000 megabit/s usage
 - d. capacity on multi-homed, carrier-agnostic backbone for
 - e. expanding network requirements
 - f. 95th percentile bursting and billing increments
 - g. Core and peripheral network engineered for 100 percent uptime
- b) Target: minimum 99.9 percent availability for each virtual server during each month.

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- c) Failure to meet any of the targets or service levels in any calendar month shall require CLIMBIT to refund \$2,500 to PTRC for each month or portion thereof where a target or service level is not met.

Exclusions

- a) Outages due to fire, flood, acts of God, or war
- b) Problems solely attributable to PTRC applications, operating systems, LAN, or Internet connections
- c) Outages solely attributable to any change made by any non-CLIMBIT employee, agent or contractor
- d) Scheduled maintenance: maximum one hour per week between 9 p.m. and 6 a.m. CST, announced at least three days in advance; with the exception that CLIMBIT may schedule an emergency security update upon less notice or during other hours where such update is time-sensitive. Emergency maintenance time shall not be excluded from the calculation of whether a service level has been met.
- e) Outages experienced at an individual end-user's PC

Chronic Outages

- a) CLIMBIT commits that the CLIMBIT hosted or supported servers will continue to function without chronic outages after its acceptance. If a CLIMBIT hosted or supported server suffers from chronic outages, then PTRC may cancel the Service without any further payment obligations.
- b) Chronic outages are defined as five or more service interruptions, each lasting two hours or more, within any period of 30 consecutive calendar days. A service request must be made by PTRC for each service interruption while the interruption is occurring, and a PTRC technical administrator must provide reasonable assistance while the CLIMBIT Technical Support personnel attempts to resolve the problem. PTRC must give notice of intent to cancel within seven calendar days after the fifth service interruption. CLIMBIT shall then have 30 calendar days, known as the resolution period to resolve the problem. The problem shall be deemed to be unable to be resolved by CLIMBIT if there are more than two service interruptions of two hours or more within 30 calendar days after the resolution period.

Technical Support

- a) CLIMBIT will provide PTRC with comprehensive technical support for the Virtual Server Solution that is causing any interruption of service
- b) Normal business hours for support are from 8 a.m. to 8 p.m. CST Monday through Friday, excluding Canadian national holidays
- c) Time to respond is within a four-hour window during normal business hours and a best-efforts outside normal business hours

Client e-mail technical support

- a) Standard support e-mail hours: 8 a.m. to 8 p.m. CST Monday through Friday, excluding Canadian national holidays
- b) Emergency support e-mail hours: 24 hours, 7 days per week, excluding Canadian national holidays
- c) Enter a service request at by contacting Technical Support by e-mail: support@climbit.ca.

Client phone technical support

- a) Phone hours: 9 a.m. to 5 p.m. CST Monday through Friday, excluding Canadian national holidays
- b) Phone number: 800/348-0426
- c) Only PTRC technical administrators may request technical support. PTRC technical administrators are to be designated by PTRC upon execution of this Statement of Work.
- d) Upon contacting Technical Support, PTRC will be required to provide contact information for a PTRC contact person and a full description of the problem including error messages, screenshots, and other troubleshooting information as reasonably requested by CLIMBIT Technical Support personnel
- e) CLIMBIT's time to respond to technical support issues depends on the complexity of the inquiry and support requests volume. CLIMBIT assigns the highest priority to client inquiries related to the servers' unavailability. These issues are addressed first upon notification from the client. The time to respond guarantee does not apply to any inquiries that require extensive research and testing.

CLIMBIT will comply with and abide by the table of priority levels, level definitions and guaranteed response times set out in Annex 7.

1.4 MODIFICATIONS

CLIMBIT reserves the right to modify any of the above service level commitments upon 30 days written notice to PTRC. These modifications may apply both to new and existing services ordered under this agreement. If these modifications reduce the future levels of committed service delivery for existing services, then PTRC may cancel these services, execute a Soft Landing entirely at the cost and expense of CLIMBIT and receive the following compensation: A refund of the balance of monthly support services for the term of the agreement. Unless the client provides notice of intent to cancel existing services within 30 days after written notice was issued by CLIMBIT, the client is deemed to have accepted the service level commitment modifications for all services ordered under this agreement.

1.5 TRANSFER OF DATA AFTER TERMINATION,

Within three Business Days after the service is terminated, CLIMBIT will copy PTRC's virtual server images containing any STEPS Online Collaborative Research Community data and any other PTRC data to a PTRC-supplied USB drive or other mutually agreed medium, and deliver this to PTRC, provided that PTRC is current on all prior undisputed invoices. PTRC is responsible for covering all reasonable shipping fees.

1.6 SOLUTION ACCEPTANCE

The acceptance of the solution shall not be delayed if facilities, equipment, services, or applications not ordered from CLIMBIT are not functional.

- a) The solution activation date shall be the date when virtual servers are:
- i) Operational, having met the following acceptance criteria:
 - a. Operational for a period of 2 weeks with a minimum availability of 99.9% and
 - b. The Deliverables in this Statement of Work have been approved and signed off by PTRC, in accordance with the terms of the Agreement
 - ii) If the client discovers a problem with the Virtual Server Solution within 5 days after approval as set out above, then CLIMBIT shall rectify the problem, and inform the client when the Virtual Server Solution is ready and this shall be the new solution activation date. Client shall have five (5) Business Days to test the solution for compliance with the above acceptance criteria. Where PTRC does not notify CLIMBIT that the Virtual Server Solution has failed to meet the acceptance criteria within such period, it shall be deemed to have accepted same.

1.7 ENGAGEMENT CONTEXT AND VISION

A revised web presence is proposed to provide PTRC with a global, best-in-class, knowledge management and collaboration capability and web-based marketing platform in support of its global leadership role in the advancement of Oil Recovery technologies and methods.

The investment in this enabling technology supports the objective of transforming PTRC from its current state in STEPS to a new Target State by January 1, 2012.

<p>Current State</p> <ul style="list-style-type: none"> • 4 members • Limited pipeline to people and industries that are most likely to see value in PTRC research and publications. • 18 months into a 4 year horizon from the Business Led Networks of Centers of Excellence (BLNCE) 	<p>Target State – January 31, 2012 (Note: This target state has been defined by PTRC for contextual purposes, the delivery of which is out of scope for the Statement of Work, which is limited to the Phase 1 of PTRC's plans to achieve this target state.</p> <ul style="list-style-type: none"> • PTRC is recognized as the "go-to" organization for Enhanced Oil Recovery knowledge, know-how and expertise; • Increase content usability, formats, number of publications targeted to specific industry needs and knowledge gaps; • Implement content and knowledge management process to ensure higher value to industry • Exposure of PTRC Intellectual property to a targeted universe of stakeholders, users, researchers in industry and government;
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<ul style="list-style-type: none"> Limited outcomes to date 	<ul style="list-style-type: none"> Commercialize PTRC's intellectual property more effectively to generate opportunities by increasing membership levels and gross funding through an online collaboration community model which invites prospective members into a community of experts and collaborative partners, and privileges that include intellectual property access; Engagement of more research organizations with a unique collaborative environment; Improved disclosure management processes to ensure potentially value information or intellectual property is not prematurely disclosed and disclosed in a way so as to attract interest from industry.
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1.8 CONTEXT OF WORK

The context of this Statement of Work is to enable the achievement of the target state by PTRC as understood in planning discussions with PTRC. The following reflects the understanding of the context within which this Statement of Work fits PTRC's overall plans.

- a) Enable PTRC to fully realize the below BL-NCE criteria by June 1, 2011
 - i) Promotion of research capabilities and capacities
 - ii) Provide researchers with collaborative capability necessary to collaborate in research activities over long distances without interruption at any time of their choosing
- b) Demonstrate PTRC's leadership in BL-NCE as a transformational approach to public / private sector research collaboration by January 1, 2012.
 - i) Promote material developed by SRC, AITF, U of R and U of C.
- c) Create a "Community" as an integral part of a strategy to turn the PTRC into the "go to organization" for petroleum technology research.
- d) Provide support to PTRC, its board and other stakeholders for the promotion of PTRC.

1.9 IN SCOPE

The scope of services includes the following activities.

- a) Project Management
- b) Website design, development, testing and production
- c) Public relations
- d) Community Management and Member on boarding
- e) System and service level management and maintenance
- f) Procurement, installation, configuration of necessary hardware and software
- g) System hosting and administration

Deliverables and timelines are provided in Section 2.1 of this Statement of Work

1.10 PROJECT DEPENDENCIES

The scope of proposed services, the price and delivery times are predicated on the assumption that PTRC will make reasonable efforts to provide the following functions.

- a) Timely availability (within 2 Business Days of notification from ClimBIT) of PTRC personnel for the purposes of issue management, community management, content loading and training in aforementioned activities.
- b) Necessary materials provisioning such as images or photography within 3 Business Days of notification from ClimBIT, where PTRC is entitled to do so.
- c) Reasonable (5 Business Days) turnaround time on feedback and review of CLIMBIT deliverable drafts.
- d) Timely availability (within 3 Business Days), accessibility, accuracy, completeness and currency of requested PTRC internal information where reasonably necessary. Such information shall remain Confidential Information of PTRC.

Service quality impacts and increased costs as a result of these functions not being met by PTRC will be handled through the Change Management Process identified in Annex I.

2. DESCRIPTION OF WORK

2.1 DELIVERABLES

ClimbIT has identified the following Phase 1 deliverables to be completed by March 31, 2011: All work will comply with Microsoft SharePoint 2010 Recommended Practices and Operating Procedures and all Deliverables will meet any Acceptance Criteria that are communicated by the Executive Director of PTRC. A determination of whether any Deliverable has met the Acceptance Criteria is at the discretion and requires the unanimous satisfaction of the Executive Director of PTRC and the PTRC Project Manager.

STEPS Web Infrastructure

- a) Hardware design and deployment
- b) Software (SharePoint and enabling technology) deployment and configuration
- c) Infrastructure hosting, maintenance and management

Content Publishing

- a) Content Review and Analysis
 - i) Review the 2009-2010 STEPS research projects (review and summarize research reports)
- b) Research & Industry Member Profile Development (PTRC will provide the profile requirements and information)

Member Site Design, Creative Branding

- a) Determining branding requirements
- b) Review design objectives
- c) Plan branding approach
- d) Architecture and Wireframe review
- e) Develop, review and finalize design concepts

Functionality Enablement

- a) Member Site (design, and development)
- b) User Interface design and testing
- c) Configure to support Profiles, Search, and Research (Project) Summary Sites
- d) Usability and functionality testing
- e) User Training (Preliminary training for early site users)

2.2 DEVELOPMENT WORKPLAN (NON-RECURRING)

Activity	Functional Requirements and Deliverables
Identity Planning and Discovery	New PTRC Look and Feel
Site Design	Design of new site templates for public and member sites
a) Content Republishing	a) Migration of selected documents and research deliverables from current web environment to SharePoint collaborative community environment b) Meta-tagging of information tied to membership levels and intended disclosure taxonomy c) Rewrite abstracts to better communicate value of research
Site Development	Community Development
	Public Site / Member Site Development
	Researcher & Industry Profiles
	Research Organization Profiles
	Content loading

Activity	Functional Requirements and Deliverables
	Hardware and Software infrastructure design, deployment and hosting
	Configure limited search for knowledge and content

Acceptance criteria will be fully based on the satisfaction of the Executive Director of PTRC that the above deliverables and functional requirements have been met to the satisfaction of PTRC.

2.3 PROJECT DELIVERABLES SCHEDULE

The above project deliverables will be implemented by April 15, 2011.

Project Deliverable schedules and costs for subsequent phases will be as per the Project Plan attached as Annex 8.

All services specific in the Statement of Work will be initiated immediately upon approval of the Statement of Work.

3. ROLES AND RESPONSIBILITIES

3.1 OVERVIEW

CLIMBIT envisions a breadth of roles will be required to deliver Phase 1 of this project such as IT and Technology Expertise, deep Subject Matter expertise, as well as expertise in the areas of Design, Branding and Public Relations. CLIMBIT has engaged a world class team which will collaborate on all areas of this project.

The Mera Group will support subject matter requirements, content publishing, and overall contributions their team can make to the functionality of the Community based on their knowledge of this research area.

Mera Group is a consulting company, specifically created to provide consulting services and strategic counsel to oil and gas clients with domestic and/or international assets. Mera specializes in using technology to develop tools and processes that add value by optimizing operational practices and enhancing safety, as well as improving financial performance. Mera's operations expertise and technology savvy allows Mera to work closely with IT groups and represent on the behalf of clients.

The Phoenix Group provides expertise in creative design, branding, communications and media strategy will provide a world-class presence to the STEPS Online Collaborative Research Community

Phoenix Group is a full service communications firm specializing in advertising, marketing and branding. Phoenix Group is driven by a relentless spirit of creativity and service. The Phoenix Head office in Regina is home to 38 employees. Their clients are located across Western Canada and span a variety of industries including financial services, tourism, oil and gas and telecommunications.

CLIMBIT ROLES AND RESPONSIBILITIES

CLIMBIT will be responsible for all tasks and all deliverables as outlined in this Statement of Work. The CLIMBIT project team will assume the following roles during this project. A staff member may assume more than one role. Except where any individual listed below becomes disabled, dies or ceases to be employed by CLIMBIT, the consent of PTRC shall be required to replace any of the below listed individuals.

3.2 CLIMBIT PROJECT MANAGER – TYLER LECOUFFE

The CLIMBIT Project Manager will be responsible for the day-to-day management of the project and will assume overall responsibility for the project delivery from the perspectives of time, cost, and quality. In addition, the CLIMBIT Project Manager will assist PTRC's Project Manager in assessing the implications of requests for changes in scope or service levels, developing risk management strategies, measuring deliverables and gaining acceptance as

well as coordinating the various aspects of the project, services, identifying issues, and either resolving them or escalating them to PTRC's Project Manager.

3.3 CLIMBIT PROJECT DIRECTOR – HENRY JAFFE

The CLIMBIT Project Director will oversee the project and service status, validating critical success factors and overall alignment of the services with PTRC's requirements. This includes responsibility for the overall project progress and deliverables.

3.4 INFRASTRUCTURE BUSINESS CONTINUITY MANAGER – NIALL WILSON

The Infrastructure Business Continuity Manager is responsible for ensuring the high availability and of the system infrastructure and minimal disruption of infrastructure outages on PTRC operations.

3.5 APPLICATION MAINTENANCE SPECIALIST – JEFF WILLIAMS

The Application Maintenance Specialist is responsible for ensuring that all versions and configuration of the PTRC infrastructure are running off the most current fixes, patches and versions of vendor software.

3.6 COLLABORATIVE COMMUNITY MANAGER – BRYAN OCONNOR

The Collaborative Community Manager is responsible for the on-boarding of new members and for stimulating collaboration and knowledge activity within the community and reporting on such activity.

3.7 SENIOR SHAREPOINT DEVELOPER – JEFF WILLIAMS

The Senior SharePoint Developer is responsible for architecting and implementing functional requirements as defined by the Business Analysis in a best practices fashion with an eye to configuration repeatability, reuse and low ongoing maintenance and total cost of ownership by PTRC.

3.8 BUSINESS ANALYST – MARK FLEWELLING

The Business Analyst is responsible for documenting PTRC requirements, confirming their scope and functionality with the PTRC Secretariat, documenting and reporting on these requirements and developing an Enterprise and Information Architecture in alignment with the PTRC business architecture.

PTRC ROLES AND RESPONSIBILITIES

PTRC is responsible for the following and will assume the following roles during this project. A Petroleum Technology Research Centre staff member may assume more than one role.

3.9 PTRC PROJECT SPONSOR – EXECUTIVE DIRECTOR ♦

The PTRC IT Project Sponsor will have authority to approve expenditures in writing. The Project Sponsor will oversee the status of the project effort, validate progress against PTRC's business objectives, and monitor issues. The PTRC Project Manager will be responsible for reviewing and approving Statements of Work, the detailed project plans, and estimated costs.

3.10 PTRC PROJECT MANAGER – HEATHER QUALE ♦

The PTRC Project Manager will serve as the primary PTRC contact for the overall coordination of CLIMBIT and PTRC activities. The PTRC Project Manager will ensure that Deliverables are reviewed and approved or rejected, that issues beyond the project team's control are escalated and resolved in a timely manner, and for coordinating access to and availability of other PTRC employees as necessary.

3.11 PROJECT STEERING COMMITTEE

The Project Steering Committee, composed of the key project stakeholders from Climbit and PTRC, will be required on a part-time basis to oversee the project. They will be responsible for approving project plans, and overseeing project progress on a majority vote basis. The Project Steering Committee will be composed of:

- Dr. Malcolm Wilson, PTRC Project Sponsor
- Henry Jaffe, Project Director, CLIMBIT
- Heather Quale, PTRC Project Manager

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3.12 RESPONSIBILITY FOR ACCEPTANCE/CHANGE APPROVAL

The PTRC Project Sponsor will be responsible for the acceptance of work completed by CLIMBIT and accepting or rejecting all change requests.

4. STATEMENT OF WORK ACCEPTANCE

The work defined in this Statement of Work will be performed in accordance with this Agreement dated March 16, 2011 between PTRC Inc. and Climbit Inc.

Signatures indicate acceptance of the Statement of Work and signify authorization to proceed with scheduled activities.

ACCEPTED BY:

Climbit Inc.



Signature
Tammy Brandy
Managing Director

Climbit Inc.

April 18, 2011.
Date

PTRC Inc.



Signature
Dr. Malcolm Wilson
Executive Director

Petroleum Technology Research Centre Inc.

April 18/2011
Date

ANNEX I CHANGE MANAGEMENT

1. Potential changes include:

- a) An additional deliverable not defined in this document
- b) An additional activity or step not defined in this document for a planned deliverable
- c) A change in the scope of a deliverable defined in this document
- d) Further changes to an accepted deliverable
- e) A contradiction to items or assumptions stated in this document
- f) Time spent to investigate/estimate any change request
- g) Time lost due to reasons such as unavailability or inappropriateness of hardware/software or delays in expected turnaround for answers to questions, information needed or decisions from client personnel.

Requested changes will be documented in writing. The impact of the change to both project cost and schedule will be assessed and included in the documentation. All change requests will be summarized and logged in a Change Request Log kept by the CLIMBIT Project Director.

CLIMBIT's Project Manager will assess the impact of each proposed change on both project cost and schedule, and the relevant information will be presented to PTRC's Project Manager. PTRC's Project Manager will review all change requests for acceptance and accept or reject within five (5) Business Days. Where no response is received within such time, the change request is deemed to be rejected. The project plan, project schedule and cost estimates will be revised in accordance with the approved changes. Approved changes will immediately be included in the Project Plan. All change requests will be logged, tracked and reported on in status reports and subsequent meetings.

All change requests will be summarized and logged in a Change Request Log.

2. Change Acceptance

Formal change acceptance is required before working on any changes outside of the scope of the project, as set out in the approved project plan. Change acceptance is given when both PTRC and CLIMBIT formally approve the change by signing off on the request form.

ANNEX 2 DELIVERABLES ACCEPTANCE MANAGEMENT

1. Acceptance Procedure

The acceptance procedure for all Deliverables outlined in this Statement of Work is as follows:

- a) CLIMBIT will attach a Deliverable Acceptance form to each Deliverable presented to the client for review and approval.
- b) The Deliverable Acceptance form should be signed and returned to CLIMBIT upon review of the Deliverable within five (5) Business Days if PTRC accepts the Deliverable. Otherwise the Deliverable shall be deemed rejected.
- c) If a deliverable is rejected, PTRC will promptly provide a detailed description of why it was rejected on the Deliverable Acceptance form, including a list of which Acceptance Criteria have not been met.
- d) The rejected Deliverable will be modified to address the concerns set out by PTRC and resubmitted for acceptance. Errors or omissions not detailed in a first rejection will be handled by a Project Change Request. Where a Deliverable is rejected by PTRC a second time, it shall be entitled to immediately terminate this Statement of Work and invoke a Soft Landing at the sole expense of Climbit.

PTRC's Project Manager is responsible for the review and approval of deliverables.

2. Final Acceptance

At the conclusion of the SOW and the acceptance by PTRC of all Deliverables, PTRC will be presented with a final acceptance form to acknowledge that all requirements as defined in the SOW and amended through approved change requests are complete.

ANNEX 3 – CHANGE REQUEST FORM
Change Request (CR)

Client Name _____ Client No. _____
Project Name _____ Project No. _____

SECTION A: CHANGE REQUEST DESCRIPTION

PCR Initiator _____ PCR Date _____
PCR No. _____ Priority _____
Type of Change _____ (High/Medium/Low)
(Scope/Compliance/Informational)

Description of Requested Change: _____

SECTION B: IMPACT OF CHANGE

Resource(s) Impacted by Change: _____

Estimated Impact to Budget and Schedule: _____

Total Estimated Cost: _____

Estimated Revised Completion Date: _____

SECTION C: PROJECT MANAGEMENT APPROVAL

Date Submitted: _____
Comments: _____

Client Approval: _____ Title: _____ Date: _____

CLIMBIT Approval: _____ Title: _____ Date: _____

ANNEX 4 – DELIVERABLE ACCEPTANCE FORM

Deliverable Acceptance/Task Completion

Client Name _____ Client No. _____
Project Name _____ Project No. _____
Deliverable Name _____ Deliverable No. _____
Start Date _____ Completion Date _____
Date Submitted _____ Date Reply Due _____

Description

Acceptance Criteria

Client Acceptance

Approve Disapprove Value \$ _____

Remarks: _____

Signature _____ Date _____

CLJMBIT Acceptance

Approve Disapprove

Remarks: _____

Signature _____ Date _____

ANNEX 5 – STATUS REPORT FORM

Status Report

Client Name	Client No.	
Project Name	Project No.	
Week Ending		

To: Client Management (list specific names)
From: CLIMBIT Project Manager (provide name)
cc: CLIMBIT Management (list specific names)

Schedule:

Milestone	Planned Start	Actual Start	Planned End	Actual End	Status
Milestone 1					
Milestone 2					

Accomplishments This Week:

- Application 1
- Application 2

Planned For Next Week:

- Application 1

Acceptance and Change Management

Deliverable	Status	Delivered Date	Response Date
Deliverable 1			
Deliverable 2			
PCR 1			
PCR 2			

Lost Time:

Issues: *NOTE: Could instead attach issues log showing open and recently closed issues.*

- Issue:
- Staffing/Comments:

ANNEX 7 – SERVICE RESPONSE TIMES

The following table shows the targets of response and resolution times for each priority level

Trouble	Priority	Response time (in hours) *	Escalation threshold (in hours)
Service not available (all users and functions unavailable).	Critical	Within 1 hour	2 hours
Significant degradation of service (large number of users or business critical functions affected)	High	Within 4 hours	8 hours
Limited degradation of service (limited number of users or functions affected, business process can continue).	Medium	Within 24 hours	48 hours
Small service degradation (business process can continue, one user affected).	Low	Within 48 hours	96 hours

Prior to the escalation threshold time, ClimBIT will make reasonable efforts to resolve the problem and, if it is determined that no resolution is reasonably possible within this time period, will provide a temporary solution or work-around to PTRC. At the escalation threshold, where a problem remains unresolved (i.e. service has not returned to its ordinary level), ClimBIT shall devote all of its resources to resolving the problem and shall take all steps to return service to normal levels. PTRC may treat a failure to resolve a problem within the escalation threshold as a modification subject to section 1.4 of this SOW to which the same remedies apply.

ANNEX 8 – PROJECT PLAN

[ATTACHED]

PTRC STEPS Program Web Enablement Project - Phase 1

ID	Task Name	Duration	Feb '11							Mar '11							Apr '11							May '11						
			T	S	W	T	F	S	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S		
1	PTRC STEPS PROJECT - Phase 1	60 days?	[Gantt bar spanning from Feb 1 to May 1]																											
2	Plan Phase	31.5 days?	[Gantt bar spanning from Feb 1 to Mar 2]																											
3	Define Terms of Reference	0.25 days	[Gantt bar spanning from Feb 1 to Feb 1]																											
4	Complete Sub-Contractor Agreements	0 days	[Milestone diamond on Feb 1]																											
5	Complete Terms of Reference Worksheet for project resources	2 hrs	[Milestone diamond on Mar 4]																											
6	Project Kickoff	5.5 days	[Gantt bar spanning from Feb 1 to Feb 6]																											
7	Meeting Preparation	1 day	[Gantt bar spanning from Feb 1 to Feb 1]																											
8	Project Plan	1 day	[Gantt bar spanning from Feb 1 to Feb 1]																											
9	Powerpoint	1 day	[Gantt bar spanning from Feb 1 to Feb 1]																											
10	Hold Meeting	2 hrs	[Gantt bar spanning from Feb 1 to Feb 1]																											
11	Define vision statement and roadmap	4 hrs	[Gantt bar spanning from Feb 1 to Feb 1]																											
12	Determine Project success criteria	4 hrs	[Gantt bar spanning from Feb 1 to Feb 1]																											
13	Followup Communications (Risks, Dependencies)	1 day	[Gantt bar spanning from Feb 1 to Feb 1]																											
14	Create Meeting Site	0.25 days	[Gantt bar spanning from Feb 1 to Feb 1]																											
15	Create and Customize TeamSite	2 hrs	[Gantt bar spanning from Feb 1 to Feb 1]																											
16	On-board Project Team Members	0 days	[Milestone diamond on Feb 17]																											
17	Determine Branding Requirements	19 days	[Gantt bar spanning from Feb 1 to Feb 20]																											
18	Strategy	19 days	[Gantt bar spanning from Feb 1 to Feb 20]																											
19	Branding Workshop	19 days	[Gantt bar spanning from Feb 1 to Feb 20]																											
20	Branding and Visuals Requirements Gathering	1 hr	[Milestone diamond on Feb 20]																											
21	Prepare for workshop	1 day	[Gantt bar spanning from Feb 20 to Feb 20]																											
22	Review with PTRC	2 hrs	[Gantt bar spanning from Feb 20 to Feb 20]																											
23	Branding Approval	0 hrs	[Milestone diamond on Mar 9]																											
24	Create Artefacts	17 days	[Gantt bar spanning from Feb 20 to Mar 7]																											
25	Brand Goals	1 day	[Gantt bar spanning from Feb 20 to Feb 20]																											
26	Core Messaging - Value Proposition	1 day	[Gantt bar spanning from Feb 20 to Feb 20]																											
27	STEP Branding	4 days	[Gantt bar spanning from Feb 20 to Feb 24]																											
28	Develop initial community concepts	0.9 days	[Gantt bar spanning from Feb 20 to Feb 20]																											
29	List of current and potential member companies, researchers and stakeholders	0.4 days	[Gantt bar spanning from Feb 20 to Feb 20]																											
30	Segment and analyse current potential members	0.5 days	[Gantt bar spanning from Feb 20 to Feb 20]																											
31	Document how potential members will join and be active in the community to create content	0.08 days	[Gantt bar spanning from Feb 20 to Feb 20]																											

Task		External Milestone		Manual Summary Rollup	
Split		Inactive Task		Manual Summary	
Milestone		Inactive Milestone		Start-only	
Summary		Inactive Summary		Finish-only	
Project Summary		Manual Task		Progress	
External Tasks		Duration-only		Deadline	

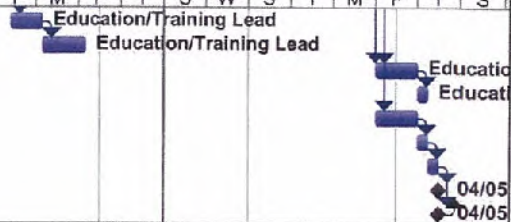
PTRC STEPS Program Web Enablement Project - Phase 1

ID	Task Name	Duration	Feb '11							06 Mar '11							03 Apr '11							17 Apr '11							01 May '11						
			T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S					
32	Determine User and Business Requirements	14 days	[Summary bar]																																		
33	Review/Detail Preliminary Enduser and Business Requirements	14 days	[Summary bar]																																		
34	Document User Experience requirements	2 days	[Task bar]																																		
35	Produce SharePoint Permissions Worksheet	2 days	[Task bar]																																		
36	Document content management and taxonomy structure (how will information be viewed by who)	2 days	[Task bar]																																		
37	Plan information portal and site collection taxonomies and hierarchies	0.5 days	[Task bar]																																		
38	Plan branding approach	0.1 days	[Task bar]																																		
39	Determine branding requirements	1 day	[Task bar]																																		
40	Plan structure	0.1 days	[Task bar]																																		
41	Determine Technical Requirements	21 days	[Summary bar]																																		
42	Determine Preliminary Design	3 days	[Summary bar]																																		
43	Determine Microsoft Office SharePoint Server 2010 storage requirements	0.2 days	[Task bar]																																		
44	Create detailed wireframes for site and page structure	1.33 days	[Task bar]																																		
45	Review preliminary design objectives with executive sponsor	1 day	[Task bar]																																		
46	Information and Content Management Plan	11.47 days	[Summary bar]																																		
47	Identify additional content and design requirements	0.5 days	[Task bar]																																		
48	Identify custom development requirements	1 day	[Task bar]																																		
49	Establish and maintain user experience guidelines	1 day	[Task bar]																																		
50	Maintain brand consistency and design standards for templates	1 day	[Task bar]																																		
51	Document as needed	1 day	[Task bar]																																		
52	Plan Document Management	3 days	[Summary bar]																																		
53	Identify document management approach	0.5 days	[Task bar]																																		
54	Identify existing content sources (content audit or inventory)	2 days	[Task bar]																																		
55	Plan for Anonymous users	0.5 days	[Task bar]																																		
56	My Sites Planning	0 days	[Summary bar]																																		
57	Profile content	0 days	[Task bar]																																		

Task		External Milestone		Manual Summary Rollup	
Split		Inactive Task		Manual Summary	
Milestone		Inactive Milestone		Start-only	
Summary		Inactive Summary		Finish-only	
Project Summary		Manual Task		Progress	
External Tasks		Duration-only		Deadline	

PTRC STEPS Program Web Enablement Project - Phase 1

ID	Task Name	Duration	Feb '11			20 Feb '11			06 Mar '11			20 Mar '11			03 Apr '11			17 Apr '11			01 May '11			
			T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T
152	Schedule End User Training	1 day																						
153	Build End User Training	4 days																						
154	Conduct End User Training	2 days																						
155	Accept End User Training Materials	1 day																						
156	System Acceptance Review	2 days																						
157	Production deployment complete	1 day																						
158	Deploy production system complete	1 day																						
159	Community and Site Launch	0 days																						
160	Post-implementation review complete	0 days																						



Phase 1 Project Plan	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
	Milestone		Inactive Milestone		Start-only	
	Summary		Inactive Summary		Finish-only	
	Project Summary		Manual Task		Progress	
	External Tasks		Duration-only		Deadline	