

**Appendix C**  
**SOW 1: ERP Expert Advisor Services**  
**to**  
**OFM Competitive Procurement #19-400 for**

**Statement of Work 1**  
**to**  
**Contract Number [KXXX]**  
**for**  
**ERP Expert Advisor Services**

This Statement of Work (SOW) is made and entered by and between the State of Washington (“State”), and *[Bidder Firm Name]* (“Contractor”), for ERP Expert Advisor Services to support One Washington activities. This SOW incorporates by reference the terms and conditions of Contract Number *[KXXX]* in effect between the State and Contractor. In case of any conflict between this SOW and the Contract, the Contract shall prevail unless the SOW expressly indicates that the SOW language governs. The State and Contractor agree as follows:

**Project or Task Objectives**

The objective of this Statement of Work is to secure an experienced contractor or firm that does not resell hardware or software and does not represent ERP vendors in any way, to provide ongoing strategic support to One Washington throughout its ERP planning, procurement, and implementation. The independent advisor(s) and firm will provide objective expertise and advice on modern ERP and SaaS to ensure Washington’s best interests are represented throughout each stage.

**The ERP Expert Advisor Services Firm will provide:**

- Current marketplace acquisition and implementation expertise and trends, to include SaaS and ERP knowledge,
- Support to the Program with ERP vendor accountability,
- Assistance in development, review and documentation of independent/vendor agnostic business requirements and technical specifications,
- Advice on business process redesign, or to-be processes vs. system configuration,
- Support to the Program with evaluation and insights during the ERP SaaS Vendor evaluation process,
- Support to the Program through the refinement of the operating models, both IT and business,
- ERP expertise to support other readiness activities, both business and technology, and for both the Program and state agencies,
- Assistance to the Program with negotiation of contracts for ERP software and implementation,
- Clarification of Program vs. ERP SaaS vendor roles and responsibilities,
- Best practices in ERP implementations, to assist One Washington develop the best implementation and deployment methodology,
- Review and advise on assumptions built into the ERP SaaS implementation schedule and plan,
- Advise on business processes and how they align with ERP software functionality,
- Advise on One Washington Program’s governance structure, membership, and authority as it relates to the planning, implementing and maintaining the ERP

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- Support in reviewing vendor pricing, comparing fees attributable to software costs, services fees, development fees, implementation services, and licensing structure,
- IT industry forecasts and reports for business, especially pertaining to ERP and SaaS,
- Review of functional specifications and provide consultation to the Program on any customization advised by the ERP SaaS vendor,
- Review any delays on the implementation schedule to help identify cause and recommend solutions,
- Provide review and recommendations of any issues that arise that impact scope, schedule or budget of the project(s), and
- Review any recommendations provided to the Program by the ERP SaaS vendor, QA or other entity that has technical implications.

**Scope of Work and Deliverables**

Contractor will provide consulting services to support the strategy, development and execution of the One Washington ERP SaaS enterprise business transformation project. Contractor will work with the Program, stakeholder agencies, and other contractors to support the development of the strategy and plan for this long term, critical program.

The Contractor shall provide active daily participation in the project. This may consist of leading/presenting in meetings, coordinating activities, supporting and managing project management artifacts. Examples include: work-plan, risk management, issues management, business requirements, meeting with oversight consultant(s), or supporting vendor management.

The Contractor will attend weekly Program meetings to participate in discussions of status of activities, provide feedback on deliverables, review activity priorities, and/or receive direction regarding assignments. The Contractor may also be requested to attend stakeholder or governance meetings to participate as the ERP Expert Advisor.

The Contractor will provide leadership support to the technical implementation activities such as functional fit-gap, design, development, testing, data conversion, interface, and technical architecture.

The Contractor will support the Program's business process change, stakeholder management, change management, and communication outreach efforts.

The Contractor will provide expert input into strategic planning, deliverables review, and other Program activities.

Contractor will provide a monthly status report to the One Washington Project Manager on the ERP Expert Advisor Services perspective of the progress and direction of the program, along with any identified risks, opportunities or lessons learned.

**Deliverables and Due Dates for this SOW:**

1. Contractor will produce a monthly status report containing the ERP Expert Advisor Services perspective on critical One Washington activities. This report will include, at a minimum, and be provided **monthly** beginning September 1, 2019 or the first month after commencement of this SOW, whichever is later:

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- ERP Expert Advisor Services perspective on status and health across all activities of the Program.
- Status of activities supported with any conclusions or recommendations drawn in the prior month.
- Status of activities that were scheduled to be completed in the prior month but were not, and any perspective on the challenges or hold ups towards progress, plus any recommendations to the Program.
- Activities for support and focus for the upcoming month and beyond.
- Perspective on any issues, risks or concerns that may affect the success, scope, schedule or budget of the Program activities.
- Staffing items as needed.

**Assumptions**

*[Instructions to Bidder: Populate this section with the assumptions, if any, used when developing the scope, deliverables, timelines, resources and pricing contained within this Statement of Work.]*

**Timeline and Period of Performance**

The period of performance for this project will start on the date of signature by both parties and the work tasks are estimated to continue through June 30, 2021. The State has the right to extend or terminate this SOW at its sole discretion.

No work shall be performed by Contractor until this SOW is executed by Contractor and the State and is received by Contractor.

**Contractor Staff, Roles and Responsibilities**

Contractor will provide, at a minimum, one full time resource *[[Instructions to Bidder: propose staffing requirement for this SOW]]* to support One Washington Program ERP SaaS planning, procurement and implementation activities. This individual(s) will be defined as “Key Staff” and the role(s) is described below:

**ERP Expert Advisor Services**

The ERP Expert Advisor Services firm will provide ERP market and technology expertise to the Program, to assist the Program with appropriate readiness activities, procurement strategies, and deployment strategies.

The ERP Expert Advisor will support and advise the One Washington Program and will serve as the Contractor’s primary counterpart and main contact to the One Washington Project Manager.

This individual must have at least ten (10) years of direct experience in leading or advising ERP implementations and be a leader within their firm or company in leading procurement projects. OFM has a preference for expertise in SaaS implementations. This role should not be staffed by an individual whose primary responsibility is account management. One Washington appreciates that there may be times that working with account management resources may be advantageous, but the ERP Expert Advisor role must be filled by someone whose experience and area of focus is ERP implementations.

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[[Bidder to add additional proposed staff and their role(s) here]]

**Contractor Staff Locations**

The Contractor’s resources assigned to this Statement of Work will have the following expectations:

- ERP Expert Advisor – It is expected that the ERP Expert Advisor will be staffed full-time on the One Washington Program. This individual must be available onsite in Olympia, WA at least four (4) days a week and available remotely when offsite.
- [[Bidder to add additional proposed staff and their role(s) here]]- Collocated onsite with the One Washington project team in Olympia, WA for a minimum of four (4) days a week

**Methods, Tools and Solutions**

The Contractor will provide the following methods, tools or solutions through this Statement of Work:

[describe methods, tools or solutions]

**Compensation and Payment**

*[Instructions to Bidder: Populate the paragraph below and the staffing pricing template to provide clarity as to monthly rate of the Statement of Work and how the pricing was developed.]*

The State will pay Contractor an amount not to exceed [\_\_\_\_\_] dollars (\$\_\_\_\_) *[specify maximum monthly dollar amount]* for the monthly performance of all activities necessary for or incidental to the performance of work as set forth in this SOW. This will be a fixed monthly fee that will remain constant for as long as the Statement of Work is in effect. Contractor’s compensation for services rendered shall be based on Contractor’s Prices as set forth in the Pricing Details: Staffing provided below. Resource rates include all expenses associated with the resources including: travel, pricing for specialized skills, pricing for onsite or offsite resources, etc. The State will not reimburse or pay for any expense or item not detailed in the table below.

*[Instructions to Bidder: Populate this section with the staff required to complete the SOW, include any additional staff roles Bidder deems necessary to accomplish the goals of this SOW.]*

**Pricing Details: Staffing**

| #                    | Role               | Name(s)           | Deliverable              | Activity/ Activities | Hours per Month   | Rate    | Total      |
|----------------------|--------------------|-------------------|--------------------------|----------------------|-------------------|---------|------------|
| 1                    | ERP Expert Advisor | [Bidder populate] | 1 Monthly Status Reports | [Bidder populate]    | [xx]              | [\$xxx] | [\$x,xxx]  |
|                      |                    | [Bidder populate] |                          |                      | [Bidder populate] | [xxx]   | [\$xxx]    |
| <b>MONTHLY TOTAL</b> |                    |                   |                          |                      |                   |         | [\$xx,xxx] |

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**State Staff, Roles and Responsibilities**

*[Instructions to Bidder: Populate this section with the state staff required to complete the SOW with their roles and responsibilities.]*

**Deliverable Acceptance**

The Deliverable Acceptance process will conform to the process set forth in Contract Number [KXXX].

*[[add any additional criteria for acceptance here]]*

**Change Order Process**

**Change Request Submission**

This process provides the ability for either the Contractor or One Washington to submit a request for a change to the Statement of Work. Either party:

1. Identifies a requirement for change to any aspect of the project (e.g. scope, deliverables, timescales and organization)
2. Completes a Change Request Form (CRF) and ensures that both the One Washington Program Manager, or their designee, and the ERP Expert Advisor receive the form. The CRF summarizes the change:
  - a. Description
  - b. Business justification/reasons
  - c. Benefits
  - d. Costs
  - e. Impacts
  - f. Any supporting documentation
  - g. Approvals

**Review Change Request – Program Manager**

The One Washington Program Manager, or their designee, will review the CRF and determines whether or not additional information is required to assess the full impact of the change to the project time, scope and cost. The decision will be based on factors, such as:

- Feasibility and benefits of the change
- Complexity and/or difficulty of the change options requested
- Scale of the change solutions proposed.

The One Washington Program Manager, or their designee, will record the CRF details in the One Washington Change Log to track the status of the change request.

**Review Change Request – Program Director**

The One Washington Program Manager, or their designee, will make a recommendation and provide the Change Request Form with any supporting documentation to the One Washington Program Director for review and final determination. The Program Director will determine the feasibility of this change by examining factors, such as:

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- The Program Manager’s recommendation
- Risk to the project in implementing the change
- Risk to the project in NOT implementing the change
- Impact on the project in implementing the change (time, resources, finance, quality).

The One Washington Program Director will:

- Reject the change and notify the ERP Expert Advisor,
- Request more information related to the change from the ERP Expert Advisor,
- Forward the change as requested to the Executive Director for approval,
- Return the change to the ERP Expert Advisor to update the terms of the change.

In all events, the One Washington Program Director will notify the Contractor of the decision.

**Warranties**

Additional warranty language is not required for this SOW.

**Additional Insurance Requirements**

No additional Insurance Requirements

**Additional Terms and Conditions Specific to this SOW**

No additional Terms or Conditions specific to this SOW

*In Witness Whereof*, the parties hereto, having read this SOW [YY-YY] to Contract Number [KXXX] in its entirety, do agree thereto in each and every particular.

**Approved**

*[State]*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Print or Type Name*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Date*

**Approved**

*[Contractor]*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Print or Type Name*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Date*