Appendix C.3
Statement of Work 3
To
Contract Number *[KXXX]*
For
Organizational Change Management
Current Agency Business Processes

This Statement of Work (SOW) is made and entered by and between the State of Washington ("State"), and *[Bidder Firm Name]* ("Contractor"), for specific Organizational Change Management (OCM) Services to support One Washington activities. This SOW incorporates by reference the terms and conditions of Contract Number *[XXX-XXX-XXX]* 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:

1. Project or Task Objectives

The objectives of this SOW are to:

- Secure experienced Contractor staff to develop and manage a plan to document current state agency business processes across the state's four core administrative functional business areas: Finance, Procurement, Budget and HR/Payroll, and:
    - Secure experienced Contractor staff to then document agency business processes on-site at the agencies,
    - Train One Washington staff to be able to train agency staff in documenting business processes,
    - Develop a critical path timeline that identifies overlap or dependencies between this work and any pre-requisite effort, e.g. identification of agency systems and sub-systems that will be impacted, or any critical subsequent One Washington activity with a dependency, e.g. the Program's benchmarking effort.

2. Scope of Work and Deliverables

Contractor will develop a methodology and provide tools to use to document current agency business processes. These tools and methodology will encompass all four functional business areas in scope for the One Washington Program, Finance, Procurement, Budget and Human Resources/ Payroll.

The Contractor will train Program staff to work with agencies to assist agencies in gathering and documenting this information. The Contractor will provide oversight and support to the Program and agencies throughout the process, ensuring information is complete, consistent and timelines are met.

1. The methodology and tools will be developed and presented to the Program by August 31, 2019.
2. The Contractor will train Program staff by September 30, 2019.
3. Documentation of current agency business processes will be completed by June 30, 2020.

Expectations for deliverables, the specific work products to be delivered, invoicing and payment approval process, responsibilities of the state and the vendor, will be defined in a mutually decided upon agreement.

3. 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.]

4. Timeline and Period of Performance

The period of performance for this project will start on July 1, 2019 and the work tasks are estimated to continue through June 30, 2020. 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.

5. Contractor Staff, Roles and Responsibilities

Contractor will provide, at a minimum, [[*Instructions to Bidder: propose staffing requirement for this SOW]]* resources to support One Washington Program OCM objectives, tasks and activities. These individuals will be defined as "Key Staff" and the roles are described below:

It is expected that the OCM Practitioners staffing this SOW will be available onsite in Olympia, WA at least [[##]] days a week and available remotely when offsite.

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

6. Contractor Staff Locations

The Contractor's resources assigned to this Statement of Work will have the following expectations:
- Collocated onsite with the One Washington project team in Olympia, WA at least [[##]] days a [[week/month]]

7. Methods, Tools and Solutions

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

8. 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.

Pricing Details: Staffing

#	Role	Name(s)	Deliverable	Activity/ Activities	Hours	Rate	Total
1	OCM Practitioner(s)	*[Bidder populate]*	Provide methodology and tools to document current agency business processes.	*[Bidder populate]*	*[xx]*	*[$xxx]*	*[$x,xxx]*
2	OCM Practitioner(s)	*[Bidder populate]*	Train Program staff on the methodology and the tools to document current agency business processes.	*[Bidder populate]*	*[xxx]*	*[$xxx]*	*[$xx,xxx]*
3	OCM Practitioner(s)	*[Bidder populate]*	Final documentation of current agency business processes.	*[Bidder populate]*	*[xxx]*	*[$xxx]*	*[$xx,xxx]*
4	OCM/Lean Practitioner	*[Bidder populate]*	Final documentation of current agency business processes.	*[Bidder populate]*	*[xxx]*	*[$xxx]*	*[$xx,xxx]*
	TOTAL						*[$xx,xxx]*

9. **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.]

10. **Deliverable Acceptance**

    The Deliverable Acceptance process will conform to the process set forth in Contract Number [XXX-XXX-XXX].
    [[Add any additional criteria for acceptance here]]

11. **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 Primary OCM Practitioner 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 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:
    - 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 Primary OCM Practitioner,
- Request more information related to the change from the Primary OCM Practitioner,
- Forward the change as requested to the Executive Director for approval,
- Return the change to the Primary OCM Practitioner to update the terms of the change.

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

12. Warranties

Additional warranty language is not required for this SOW.

13. Additional Insurance Requirements

No additional Insurance Requirements

14. 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 *[XXX-XXX-XXX]* in its entirety, do agree thereto in each and every particular.

Approved   **Approved**

[State]   *[Contractor]*

_____   _____
Signature   *Signature*

_____   _____
Print or Type Name   *Print or Type Name*

_____   _____
Title   *Title*
Date   *Date*