

Appendix C.1
Statement of Work 1
to
Contract Number [KXXX]
for
ERP SaaS Procurement Assistance Services Consultants

This Statement of Work (SOW) is made and entered by and between the State of Washington (“State”), and *[Bidder Firm Name]* (“Contractor”), for specific ERP SaaS Procurement Assistance 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

In support of the state enterprise transformation, the objective of this SOW is to provide administrative support and oversight for all SOW under this contract, with the purpose of developing a competitive procurement process to choose a SaaS ERP solution to support the One Washington program objectives. With experienced Contractor staff, Contractor will provide consistent and ongoing support to One Washington for ERP SaaS procurement assistance activities, and collaborate to develop, implement, guide and monitor these procurement activities as follows:

Work with One Washington to develop, implement, guide, monitor and support an ERP SaaS procurement.

The vendor will work collaboratively with the One Washington Program and the Agency stakeholders to develop a complete competitive procurement process to choose the ERP SaaS vendor and hosting/deployment environment. The vendor will ensure the key requirements for this procurement are clear, complete, testable and representative of the business needs of the State. The vendor will also document all key requirements to create a Requirement Traceability Matrix for use by the Program.

The ERP SaaS Procurement Assistance Contractor will provide:

- Current marketplace acquisition expertise, preferably to include SaaS and ERP
- Complex IT procurement subject matter expertise
- Support and supplement to existing Program staff, time and expertise, in the ERP SaaS competitive procurement development
- Assistance to the Program with the creation and negotiation of contracts for ERP SaaS software, implementation and hosting/deployment environment, or other related needs
- Expertise to support ERP SaaS vendor accountability
- Assistance in the development, review and documentation of independent /vendor agnostic key requirements, that include business capabilities and technical specifications to meet the state’s needs

- A proven process and methodology to ensure “apples-to-apples” analysis of the ERP SaaS competitive procurement responses, to assist in the right selection to best meet the state’s needs, and
- Facilitation of the vendor evaluation process

To this end, the Contractor will support One Washington through the procurement and contract negotiation processes of the selection of the ERP SaaS vendor.

Scope of Work and Deliverables

Contractor will provide consulting services to support the strategy, development and execution of a competitive procurement process to choose the One Washington ERP SaaS vendor. Contractor will seek input from the Program and stakeholder agencies when developing the strategy and plan for this critical procurement.

Contractor will also:

Administrative Support:

1. Develop and maintain a detailed work plan and schedule to describe the strategy, deliverables, schedule of activities under this contract, and processes/methods used to complete the deliverables.
2. Provide Weekly status reports to the One Washington Project Manager on the status of all deliverables, as well as any identified risks, opportunities or lessons learned.
3. Deliver a Final Report summarizing activities performed, deliverable format/status, and lessons learned during the contract.

Deliverables and Due Dates for this SOW:

Administrative:

1. Develop a detailed work plan and schedule for the development, and execution of a competitive procurement process to choose the ERP SaaS vendor for the One Washington program.
 - The draft work plan and schedule will be delivered to the Program no later than August 31, 2019.
 - The final work plan and schedule will be delivered to the Program no later than September 30, 2019.
2. Contractor will produce a weekly status report containing information for all of the Contractor’s One Washington activities and responsibilities. This report will include, at a minimum, and be provided **weekly** beginning August 1, 2019:
 - Comprehensive status and health across all activities of this contract and SOWs
 - Status and health of the efforts within each of the activities of all SOWs
 - Status of activities worked on and/or completed in the prior week

- Activities that were scheduled to be completed in the prior week but were not, including an explanation as to why
 - Activities scheduled for the upcoming week and beyond
 - Any issues, risks or concerns that may affect the success, scope or schedule of these procurement activities.
 - Staffing items as needed
3. Deliver a Final Report summarizing all activities performed under this SOW, to include deliverables, format/status, and lessons learned, to the One Washington Program.
- The draft final report will be delivered to the Program no later than April 30, 2021.
 - The final plan will be delivered to the Program no later than June 25, 2021.

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, *[[Instructions to Bidder: propose staffing requirement for this SOW]]* resources to support One Washington Program ERP SaaS procurement activities. These individuals will be defined as “Key Staff” and the roles are described below:

Primary Procurement Assistance Practitioner

The Primary Procurement Assistance Practitioner 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 complex IT procurements and be a leader within their firm or company in leading procurement projects. 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 Primary Procurement Assistance Practitioner role must be filled by someone whose experience and area of focus is complex IT procurements.

It is expected that this individual will be available onsite in Olympia, WA at least one (1) day a week throughout the duration of the agreement and available remotely as needed. The Primary Procurement Assistance Practitioner will participate as needed in One Washington meetings at the

discretion of the One Washington Program Director. Examples include program planning, stakeholder participation, program governance, program status, risk/issue/concern identification, documenting decisions and remediation.

Procurement Assistance Practitioner Lead

The Procurement Assistance Practitioner Lead will lead, coordinate or complete Contractor tasks, activities, deliverables and responsibilities across all Contractor One Washington Statements of Work. This individual will also act as the key point of contact between the One Washington Program and the Contractor organization.

This individual must have at least five (5) years direct experience in leading complex IT procurements and be a leader within their firm or company in leading procurement projects.

It is expected that the Procurement Assistance Practitioner Lead 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]]

Contractor Staff Locations

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

- Primary Procurement Assistance Practitioner – Collocated onsite with the One Washington project team in Olympia, WA at least four (4) days a week.
- Procurement Assistance Practitioner Lead- 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. We expect a monthly invoice based on the costs, number of consultants and hours needed for any specific month to provide the Deliverables described in this SOW. 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 per Month	Rate	Total
1	Primary	<i>[Bidder populate]</i>	Administrative Support: 1 Work Plan and Schedule	<i>[Bidder populate]</i>	<i>[xx]</i>	<i>[\$xxx]</i>	<i>[\$x,xxx]</i>
2	Procurement						
3	Assistance Practitioner						
	Procurement Assistance Practitioner Lead	<i>[Bidder populate]</i>	2 Weekly Reports 3 Final Report		<i>[xxx]</i>	<i>[\$xxx]</i>	<i>[\$xx,xxx]</i>
MONTHLY TOTAL							<i>[\$xx,xxx]</i>

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 Primary Procurement Assistance 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 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:

- 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 Procurement Assistance Practitioner,
- Request more information related to the change from the Primary Procurement Assistance Practitioner,
- Forward the change as requested to the Executive Director for approval,
- Return the change to the Primary Procurement Assistance Practitioner 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

Approved

[State]

[Contractor]

Signature

Signature

Print or Type Name

Print or Type Name

Title

Title

Date

Date