GOVERNMENT OF THE DISTRICT OF COLUMBIA TASK ORDER/DELIVERY ORDER FOR SERVICES *OFFEROR TO COMPLETE BLOCKS 18 & 29*	1.REQUISITION NUMBER RQ962504	PAGE 1 of 6

2. TASK ORDER AGREEMENT NO. CW54469	3. Award/Effective Date See 30c	4. CONTRACT NUMBER GS-35F-0119Y	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE 9-1-17

7. FOR SOLICITATION INFORMATION CONTACT Email: Tiffany.Champion@dc.gov	A. NAME Tiffany Champion	B. TELEPHONE (No Collect Calls) 202.724.4537	8.OFFER DUE DATE: 9-6-17

9. ISSUED BY Office of Contracting and Procurement Information Technology Group 441 4TH Street NW, Suite 700S Washington, D.C. 20001	10. THIS ACQUISITION IS ☐ UNRESTRICTED ☐ SET ASIDE %FOR ☐ SMALL BUSINESS ☐ SMALL DISADV. BUS. ☒ GSA SIC: SIZE STANDARD:	11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED ☒ N/A ☐ 13. RESERVED 14. METHOD OF SOLICITATION ☒ RFTOP ☐ RFQ ☐ IFB ☐ RFP ☐ 2-STEP	12. PAYMENT DISCOUNT TERMS Net 30 days

5. CONTRACTOR / OFFEROR Carahsoft Technology Corporation 1860 Michael Faraday Drive, Suite 100 Reston, VA 20191 Phone: 703.871.8500	16. PAYMENT WILL BE MADE BY CODE Office of the Chief Technology Officer 200 I Street SE 5th Floor Washington, DC 20003

15A DUNS NO. 15B TAX ID NO.	

17. DELIVER TO Office of the Chief Technology Officer Attn: Stephen Miller 200 I Street SE 5th Floor Washington, DC 20003 202.280.9609	18. ADMINISTERED BY Office of the Chief Technology Officer 200 I Street SE 5th Floor Washington, DC 20003

18A. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER ☐	18B. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 16 UNLESS BLOCK BELOW IS CHECKED ☐ SEE ADDENDUM

19 CLIN NO.	20 SCHEDULE OF SUPPLIES/SERVICES	21 QUANTITY	22 UNIT	23 UNIT PRICE	24 AMOUNT
0001 - 0006	Salesforce Professional Services in accordance with Attachment B section B.4.1	various			NTE $869,461.40
0007	Travel Expenses in accordance with Attachment B section B.4.1.1	Various			NTE $32,000.00

25. ACCOUNTING AND APPROPRIATION DATA PURCHASE ORDER NO.	26. TOTAL AWARD (FOR GOVT. USE ONLY) NTE $901,461.40

27. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN ONE COPY TO THE ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL PAGES SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN. THIS ORDER IS ISSUED SUBJECT TO THE TERMS AND CONDITIONS OF THE HGAC CONTRACT IDENTIFIED IN BLOCK 4.	28. THE FOLLOWING DOCUMENTS ARE INCORPORATED BY REFERENCE INTO THIS TASK ORDER IN THE FOLLOWING PRIORITY: THIS TASK ORDER IS SUBJECT TO THE TERMS AND CONDITIONS OF THE GSA CONTRACT IDENTIFIED IN BLOCK 4.
29A. SIGNATURE OF OFFEROR /CONTRACTOR *Brian King*	30A. DISTRICT OF COLUMBIA (SIGNATURE OF CONTRACTING OFFICER)
29B. NAME AND TITLE OF SIGNER (TYPE OR PRINT) Brian King, Account Manager	29C. DATE SIGNED 09/08/2017	30B. NAME OF CONTRACTING OFFICER (TYPE OR PRINT) Chris Yi Contracting Officer	30C DATE SIGNED 9-8-17

1. SERVICES REQUIRED

The Office of Contracts and Procurement (OCP) on behalf of The Department of Small and Local Business Development (DSLBD) and the Office of the Chief Technology Officer (OCTO) seeks a vendor to provide implementation of a DSLBD Enterprise System (DES) proof of concept hosted and developed in the Salesforce Service Cloud Platform to showcase the ability to replace its current certification and compliance reporting platform.

2. PRICE SCHEDULE

The District contemplates award of a single Labor Hour contract with a Cost Reimbursement portion in accordance with 27 DCMR Chapter 24.

3. TERM OF CONTRACT

The term of the contract shall be one year from date of award specified on the cover page of this contract.

4. CONTRACTING OFFICER (CO)

Contracts may be entered into and signed on behalf of the District Government only by Contracting Officers. The name, address and telephone number of the Contracting Officer for this task order is:

> Chris Yi
> Office of Contracting and Procurement
> 200 I Street, SE Fifth Floor
> Washington, DC 20003
> Telephone: 202.724.5069
> E-mail: chris.yi@dc.gov

4.1 AUTHORIZED CHANGES BY THE CONTRACTING OFFICER

4.1.1   The CO is the only person authorized to approve changes in any of the requirements of this contract.

4.1.2   The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of this contract, unless issued in writing and signed by the CO.

4.1.3   In the event the Contractor effects any change at the instruction or request of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

5. CONTRACTS ADMINISTRATOR (CA)

5.1   The CA is responsible for the technical administration of the contract and advising the Contracting Officer as to the Contractor's compliance or noncompliance with the contract. In addition, the CA is responsible for the day-

to-day monitoring and supervision of the contract, of ensuring that the work conforms to the requirements of this contract and such other responsibilities and authorities as may be specified in writing by the Contracting Officer. The CA for this task order is:

Stephen Miller
Office of the Chief Technology Officer
200 I Street SE 5th Floor, 5213
Washington, DC 20003
Telephone: 202.280.9609
Email: stephenn.miller@dc.gov

5.2   It is understood and agreed that the CA shall not have the authority to make changes in the specifications/scope of work or terms and conditions of the contract.

5.3   Contractor shall be held fully responsible for any changes not authorized in advance, in writing, by the Contracting Officer, may be denied compensation or other relief for any additional work performed that is not so authorized, and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

6. COMPENSATION AND PAYMENT

a) The District will make payments to the Contractor, upon the submission of proper invoices, at the prices stipulated in this contract, for supplies delivered and accepted or services performed and accepted, less any discounts, allowances or adjustments provided for in this contract.

b) The District will pay the Contractor on or before the 30th day after receiving a proper invoice from the Contractor.

c) The District follows a specific policy for services related to software/hardware (SW/HW) maintenance/licenses and support services. Services provided within a District Fiscal Year (October 1 to September 30) must be billed for within the same District Fiscal Year. Invoices should only cover one District Fiscal Year at a time, and the District cannot be held liable for any such services not billed and paid with in the same District Fiscal Year (October 1 to September 30). The District issues separate payment for each District Fiscal Year for accounting and budgetary reasons.

d) By accepting this contract, for SW/HW maintenance/licenses and support services, you agree that a proper invoice constitutes a service period that covers only one District Fiscal Year at a time (October 1 to September 30).

e) Payment for approved reimbursable items and services provided on an hourly labor rate basis will be made based on submitted, approved documentation, including verified timesheets and receipts. Hourly rates shall be computed by multiplying the appropriate hourly rates in Section B by the number of direct labor hours performed. Fractional parts of an hour shall be payable on a prorated

basis. Fixed hourly rates shall be fully loaded and include wages, overhead, general and administrative expenses and profit.

7. INVOICE SUBMITTAL

a) The Contractor shall submit proper invoices on a monthly basis or as otherwise specified in this contract. Invoices shall be prepared in duplicate and submitted to OCTO Chief Financial Officer (CFO), with a concurrent copy to the Contracts Administrator (CA) specified in Section 11 below. The address of the CFO is:

> Office of the Chief Technology Officer
> Chief Financial Officer
> 200 I Street SE 5th Floor
> Washington, DC 20001

b) To constitute a proper invoice, the Contractor shall submit the following information:

i. Contractor's name and invoice date (Contractors are encouraged to date invoices as close to the date of mailing or transmittal as possible.);

ii. Task Order Agreement Number and Purchase Order Number. Assignment of an invoice number by the contractor is also recommended;

iii. Description, price, quantity, and dates of work actually performed;

iv. Other supporting documentation or information, as required by the Contracting Officer;

v. Name, title, telephone number and complete mailing address of the responsible official to whom payment is to be sent;

vi. Name, title, phone number of person preparing the invoice;

vii. Authorized signature.

8. COST REIMBURSEMENT CEILING

8.1   Cost reimbursement ceiling for this contract is set forth in Section B.

8.2   The costs for performing this contract shall not exceed the cost reimbursement ceiling specified in Section B.

8.3   The Contractor agrees to use its best efforts to perform the work specified in this contract and to meet all obligations under this contract within the cost reimbursement ceiling.

8.4   The Contractor must notify the CO, in writing, whenever it has reason to believe that the total cost for the performance of this contract will be either greater or substantially less than the cost reimbursement ceiling.

8.5   As part of the notification, the Contractor must provide the CO a revised estimate of the total cost of performing this contract.

8.6   The District is not obligated to reimburse the Contractor for costs incurred in excess of the cost reimbursement ceiling specified in Section B., and the Contractor is not obligated to continue performance under this contract (including

actions under the Termination clauses of this contract), or otherwise incur costs in excess of the cost reimbursement ceiling specified in Section B., until the CO notifies the Contractor, in writing, that the estimated cost has been increased and provides revised cost reimbursement ceiling for performing this contract.

8.7 No notice, communication, or representation in any form from any person other than the CO shall change the cost reimbursement ceiling. In the absence of the specified notice, the District is not obligated to reimburse the Contractor for any costs in excess of the costs reimbursement ceiling, whether such costs were incurred during the course of contract performance or as a result of termination.

8.8 If any cost reimbursement ceiling specified in Section B. is increased, any costs the Contractor incurs before the increase that are in excess of the previous cost reimbursement ceiling shall be allowable to the same extent as if incurred afterward, unless the CO issues a termination or other notice directing that the increase is solely to cover termination or other specified expenses.

8.9 A change order shall not be considered an authorization to exceed the applicable cost reimbursement ceiling specified in Section B., unless the change order specifically increases the cost reimbursement ceiling.

8.10 Only costs determined in writing to be reimbursable in accordance with the cost principles set forth in rules issued pursuant to Title V of the D.C. Procurement Practices Reform Act of 2010 shall be reimbursable.

9. DIVERSION, REASSIGNMENT AND REPLACEMENT OF KEY PERSONNEL

a) The key personnel specified in the contract are considered to be essential to the work being performed hereunder. Prior to diverting any of the specified key personnel for any reason, the Contractor shall notify the CO at least thirty (30) calendar days in advance and shall submit justification, including proposed substitutions, in sufficient detail to permit evaluation of the impact upon the contract. The Contractor shall obtain written approval of the CO for any proposed substitution of key personnel.

b) The District requires a qualified team to manage the relationship between the subcontracting vendor network, the resources, and District's Program Managers and finance staff. These team members should have extensive knowledge of IT industry trends and best practices. The District considers the following positions to be key personnel for this contract:

Position	Contractor Name
Engagement Manager	Sean Ryan
Senior Business Analyst	Sandeep Nehra
Senior Developer	Blake Poutra
Senior Project Manager	Denise Horton
Technical Architect	Stevie Menye m'ELLA
UI Designer	Fong Sun

10. INCORPORATED DOCUMENTS

Contractor shall perform under this task order pursuant to the terms of the following documents that are hereby incorporated by reference and made a part of this contract, which in the event of a conflict shall be resolved by giving precedence in the order of priority listed below:

(1)   This Task Order blocks 1 through 30C and sections 1 through 9.

(2)   Statement of Work, Attachment A

(3)   Price Schedule in accordance with GSA Schedule No GS-35F-0119Y, Attachment B

(4)   Contractor Proposal, Attachment C

ATTACHMENT A SOW

A.1 Scope

a. The Office of Contracts and Procurement (OCP) on behalf of The Department of Small and Local Business Development (DSLBD) and the Office of the Chief Technology Officer (OCTO) seeks a vendor to provide implementation of a DSLBD Enterprise System (DES) proof of concept hosted and developed in the SalesForce Service Cloud Platform to showcase the ability to replace its current certification and compliance reporting platform.

b. The District is requesting that the implementation use SFDC Services' application development methodology ("Adaptive Methodology") with Customer to deliver the Professional Services.

c. DSLBD and OCTO currently anticipate development of the configured Application functionality in the areas set forth in Section A.3 Requirements.

A.1.1 Applicable Documents

N/A

A.1.2 Definitions

These terms when used in this RFTOP have the following meanings:

Application – the salesforce.com on-demand CRM service and the underlying Force.com platform
CBE – Certified Business Enterprise
CRM – Customer Relationship Management
Customer – The DES Program Team of DSLBD and OCTO
DES – DSLBD Enteprise System
DSLBD – The Department of Small and Local Business Development
OCP – The Office of Contracts and Procurement
OCTO - The Office of the Chief Technology Officer
SFDC - Salesforce On-Demand CRM

A.2 Background

a. The Department of Small and Local Business Development's (DSLBD) mission is to support the development, economic growth, and retention of District-based businesses, and promotes economic development throughout the District's commercial districts. DSLBD ultimately envisions a business environment in which DC businesses are connected in real-time with local, federal, and global business opportunities; businesses navigate government quickly, confidently, and effectively; and every entrepreneur and business with a great idea and a great plan has the capital to make it happen.

b. DSLBD and the OCTO have recently initiated a program to replace the current DSLBD business systems with an integrated solution of Salesforce Community and Service Clouds.

c. The multi-phase program goals are for the Salesforce platform to replace existing functionality in the following areas:
    i. Public Community/Site
    ii. Secure Community/Site
    iii. Reviewer Service Cloud

iv. CBE Registration and Compliance, Grants Management and Business Training &
Counseling
v. Internal/External Communication and Notification
vi. Integrated Reporting
vii. User Roles and Security

A.3 Requirements

The Contractor shall provide the following:

A.3.1 Core Salesforce.com Functionality – The functionality to be implemented as part of the configured Application is described below.

The Contractor shall use a combination of standard configuration tools and custom code to design, specify, develop and configure the following currently anticipated functionality as integrated modules within the Application:

Functional Area	Description
Account (or Person Account) and Contact Management	Document requirements / user stories / story sizing
Public Registration	Document requirements / user stories / story sizing
Public Application	Document requirements / user stories / story sizing
Application Assignment/Reviews	Document requirements / user stories / story sizing
Knowledge Base	Document requirements / user stories / story sizing
Reporting	Document requirements / user stories / story sizing
Tasks and Approvals	Document requirements / user stories / story sizing
Audit Trails	Document requirements / user stories / story sizing
Measures and Taxonomy	Document requirements / user stories / story sizing
Cases and Customer Support Management	Document requirements / user stories / story sizing
Communications and Notifications	Document requirements / user stories / story sizing
Security and User Administration	a) Role hierarchy b) Sharing Rules c) Public Groups d) Apex Sharing

A.3.2 The Contractor shall:

a) Provide a comprehensive, highly available, secure solution that shall be accessed across several District agencies and the general public via client machines using browsers including Microsoft Internet Explorer, Firefox, Chrome and Safari, and on mobile platforms including iOS, Android and Microsoft Devices

b) Implement a technical solution that is scalable, reusable and extendable utilizing state-of-the-art technologies that support a Services-Oriented-Architecture (SOA), and shall not otherwise prohibit interconnectivity via another technology's protocol(s).

c) Utilize standard Force.com UI and clicks-not-code configuration will be used where reasonably possible. This assumption does not impact functionality and is specific to user interactions.

d) Implement all workflow, data validation, business logic and roll-ups to be based on standard Force.com capabilities where reasonably possible.

e) Utilize custom code to implement workflow, data validation, business logic, roll-ups and only to circumvent platform limitations or governor limits.

A.3.3 Communities User Experience and Interface Design

The Contractor shall establish a custom user interface ("UI") design concept and deliver design wireframes, comps and all needed graphic elements to facilitate the development of custom UIs (as defined in Section C.5.2 User Experience and User Interface Design).

A.3.4 User Experience and User Interface Design

The Contractor shall establish a design concept and deliver design wireframes, comps and needed graphic elements to facilitate the development of custom user interfaces for the Communities functionality set forth above.

A.3.5 User Interface (UI) Design

    a. The Contractor shall plan and create a Responsive design that provides equal experience and functionality on desktop, table and mobile devices

    b. The Contractor shall plan and create a design that supports easy navigation on all devices types in A.3.5.a to minimize the number of clicks that a customer must use to reach any section of the application

    c. The design and implementation of the design must meet ADA and Section 508 standards

    d. The Contractor shall design up to eight (8) custom wireframes for the following external facing community pages. The wireframes helps understand how a page and its components conceptually look, act, and react. The accepted wireframes serve as the basis for developing user interface comps in the next phase. Comps are intended to represent the final appearance of each screen in the digital experience.

        i. Wireframes (up to 8)

    e. Customer Community:

        i. Home Page
        ii. Public Application
        iii. Public Registration for authenticated access
        iv. Login and home page with client profile and list of cases for self-servicing
        v. Case submission and status
        vi. Up to three (3) additional wireframes, prioritized by mutual agreement between SFDC and Customer

A.3.6 System Documentation

    a. The Contractor shall create User Stories that will represent details of the business functional requirements once accepted by the customer.

    b. The Contractor shall provide analysis on the current state of CBE Online and related systems and processes
        i. The Contractor shall create data analysis documentation
        ii. The Contractor shall create documentation on process and functional gaps
        iii. The Contractor shall create user experience wireframes

    c. The Contractor shall utilize created documents in subsequent phases of work to developer the Communities prototype and the Communities Portal.

A.3.7 The Contractor shall provide the most current models, components and accessories in new, fully operational, factory sealed condition. The Contractor shall warrant and represent that the equipment is eligible for the manufacturer's normal [and extended] warranty and support with the United States to Authorized Users. The Contractor shall provide its authorized reseller agreement or certification directly provided from SalesForce (the manufacturer).

A.3.8 The Contractor shall provide a completed DSBLD Enterprise Communities Portal to include all certification workflow, process, approvals and submission requirements as defined in document deliverables

A.4 Deliverables

A.4.1 The Contractor shall perform the activities required to successfully complete the District's requirements and submit each deliverable to the Contract Administrator (CA) identified in section 9 in accordance with the following:

Item No.	Deliverable	QTY	Format/Method of Deliverable	Due Date
001	Project Management Plan	As specified in A.3	Electronic to the CA	1 week from award
002	RACI	As specified in A.3	Electronic to the CA	1 week from award
003	Baseline Schedule and Budget	As specified in A.3	Electronic to the CA	1 week from award
004	Wireframes	As specified in A.3	Electronic to the CA	1 week from award
005	User Stories / Story Map / Story Sizing	As specified in A.3	Electronic to the CA	2 weeks from award
006	High-Level Technical Solution Design	As specified in A.3	Electronic to the CA	4 weeks from award
007	Security and Profile Matrix	As specified in A.3	Electronic to the CA	4 weeks from award
008	DSLBD Enterprise Communities Portal	As specified in A.3	Software to CA	15 weeks from award

ATTACHMENT B Price Schedule

B.1 The Office of Contracts and Procurement (OCP) on behalf of The Department of Small and Local Business Development (DSLBD) and the Office of the Chief Technology Officer (OCTO) seeks a vendor to provide construction of a DSLBD Enterprise System (DES) proof of concept hosted and developed in the SalesForce Service Cloud Platform utilizing the SalesForce On-Demand CRM Services "Adaptive Methodology" to showcase the ability to replace its current certification and compliance reporting platform.

B.2 The District contemplates award of a Labor Hour contract with a Cost Reimbursement portion in accordance with 27 DCMR Chapter 24.

B.3 AGGREGATE GROUP OR INDIVIDUAL ITEM

Award, if made, will be to a single bidder in the aggregate for those groups of items indicated by "Aggregate Award Group" herein. Bidder must quote unit prices on each item within each group to receive consideration. Award, if made, on all other items will be on an individual item basis.

B.4 PRICE SCHEDULE – LABOR HOUR

a) Delivery or performance shall be made only as authorized in accordance with the Cost Reimbursement Ceiling Clause, Section 8. The District may issue orders requiring delivery to multiple destinations or performance at multiple locations. If the District urgently requires delivery before the earliest date that delivery may be specified under this contract, and if the Contractor shall not accept an order providing for the accelerated delivery, the District may acquire the urgently required goods or services from another source.

b) There is no limit on the number of orders that may be issued. The District may issue orders requiring delivery to multiple destinations or performance at multiple locations.

c) Any order issued during the effective period of this contract and not completed within that period shall be completed by the Contractor within the time specified in the order. The contract shall govern the Contractor's and District's rights and obligations with respect to that order to the same extent as if the order were completed during the contract's effective period; provided that the Contractor shall not be required to make any deliveries under this contract after contract expiration.

B.4.1 BASE YEAR – One year from date of award.

Contract Line Item No. (CLIN)	Labor Category	Hourly* Labor Rate	Estimated Labor Hours	Total Amount Not to Exceed
0001	Engagement Manager	$ 244.57	340	$ 83,153.80
0002	Senior Business Analyst	$ 250.00	680	$170,000.00
0003	Senior Developer	$ 250.00	680	$170,000.00
0004	Senior Project Manager	$ 244.57	680	$166,307.60
0005	Technical Architect	$ 250.00	680	$170,000.00
0006	UI Designer	$ 250.00	440	$110,000.00
			GRAND TOTAL B.4.1	**$869,461.40**

* The fixed hourly rates shall be fully loaded and include wages, benefits, overhead, general and administrative expenses and profit.

B.4.1.1 BASE YEAR – COST REIMBURSEMENT

Item No.	Item Description	Not to Exceed Cost
0007	**Travel Expenses[1]**	$32,000.00
	NTE Total B.4.1.1	**$32,000.00**

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[1] Costs for transportation, lodging, meals, and incidental expenses incurred by contractor personnel in official company business related to the District contract shall be allowable. Allowable costs may be based on actual cost incurred, per diem or mileage, or a combination if the method used does not result in an unreasonable charge.

Travel costs directly attributable to specific contract performance shall be allowable and may be charged to the contract as a direct cost.

Travel costs incurred in the normal course of overall administration of the business shall be allowable and shall be treated as an indirect cost.

The difference in cost between first-class air accommodations and less than first-class accommodations shall not be allowable.

CARAHSOFT'S

Department of Small and Local Business Development

Statement of Work

Certifications Online – Plan & Architect

Q# 9754530

August 18th, 2017

SOLUTION PROVIDED BY

salesforce

CARAHSOFT TECHNOLOGY CORP.
1860 MICHAEL FARADAY DRIVE, SUITE 100
RESTON, VA 20190

888.66.CARAH | WWW.CARAHSOFT.COM

August 18th, 2017

District of Columbia
441 4th Street, NW, Suite 850 North
Washington, DC 20001

Re: Carahsoft's Statement of Work for the DC Department of Small and Local Business Development

Dear Stephen Miller,

Carahsoft Technology Corp. appreciates the opportunity to provide a Statement of Work to the Department of Small and Local Business Development for a One Stop Portal using Salesforce.

Please feel free to contact me directly at 703.889.9779/ Aaron.Dixon@carahsoft.com or Brian King at 703.889.9826/ Brian.King@carahsoft.com with any questions or communications that will assist the DC Department of Small and Local Business Development in the execution of this statement of work.

Thank you for your time and consideration.

Sincerely,

Aaron Dixon

Aaron Dixon
Account Representative

TABLE OF CONTENTS

1. Scope

Subject to the terms of this SOW and the Agreement, SFDC will provide the consulting services set forth below ("**Professional Services**"). The term "**Application**" is used to refer to the salesforce.com on-demand CRM service and the underlying Force.com platform.

SFDC will use SFDC Services' application development methodology ("**Adaptive Methodology**") with Customer to deliver the Professional Services. As part of the Adaptive Methodology:

- SFDC and Customer will review, document and sign off project control documents ("**Planning Documents**") based on this SOW together with additional discovery and further detailing project execution plans, boundaries and controls.
- SFDC and Customer will review, document and sign off solution design documents ("**Design Documents**") based on this SOW together with additional discovery, further detailing the solution design and containing sufficient detail for Customer to understand and agree to the solution design.
- SFDC and Customer will document the desired Application functionality as a list of functional needs by user type ("**User Stories**").
- Customer will supply a dedicated resource responsible for product vision, representation of stakeholders to the development team and ultimately for maximizing the business value of the development effort ("**Product Owner**").

SFDC and Customer currently anticipate development of the configured Application functionality in the areas set forth in this Section 1. The scope described in this Section 1 has been used to derive the Estimated Professional Services Fees in Section 4 *Schedule and Estimated Professional Services Fees* below.

1.1. Business Objectives and Context

DC DSLBD and the Office of the Chief Technology Officer (OCTO) have recently initiated a program to replace the current DSLBD business systems with an integrated solution of Salesforce Community and Service Clouds.

The multi-phase program goals are for the Salesforce platform to replace existing functionality in the following areas:

- Public Community/Site
- Secure Community/Site
- Reviewer Service Cloud
- CBE Registration and Compliance, Grants Management and Business Training & Counseling
- Internal/External Communication and Notification
- Integrated Reporting
- User Roles and Security

For Phase 1, this project proposes Cloud Services to deliver Plan & Architect phase artifacts, and begin construction of an MVP Communities Prototype. As part of this proposal, Cloud Services will analyze the current state CBE Online and related systems and processes, identify gaps and target state options, perform data analysis and taxonomy mapping, develop user experience wireframes for the new site, and develop a backlog of prioritized user stories. The outputs of which will be used in a subsequent phase of work to develop the MVP Communities prototype.

These artifacts will become inputs into a proposed follow-on Implementation phase for CBE Certification and the other business units.

1.2. Functional Scope

The functionality to be implemented as part of the configured Application is described below.

1.2.1. Core Salesforce.com Functionality

SFDC will use a combination of standard configuration tools and custom code to design, specify, develop and configure the following currently anticipated functionality as integrated modules within the Application:

Functional Area	Description
Account (or Person Account) and Contact Management	• Document requirements / user stories / story sizing
Public Registration	• Document requirements / user stories / story sizing
Public Application	• Document requirements / user stories / story sizing
Application Assignment/Reviews	• Document requirements / user stories / story sizing
Knowledge Base	• Document requirements / user stories / story sizing
Reporting	• Document requirements / user stories / story sizing
Tasks and Approvals	• Document requirements / user stories / story sizing
Audit Trails	• Document requirements / user stories / story sizing
Measures and Taxonomy	• Document requirements / user stories / story sizing
Cases and Customer Support Management	• Document requirements / user stories / story sizing
Communications and Notifications	• Document requirements / user stories / story sizing
Security and User Administration	• Role hierarchy • Sharing Rules • Public Groups • Apex Sharing

1.2.1.1. Core Salesforce.com Assumptions

- Standard Force.com UI and clicks-not-code configuration will be used where reasonably possible. This assumption does not impact functionality and is specific to user interactions.
- All workflow, data validation, implementation of business logic and roll-ups will be based on standard Force.com capabilities where reasonably possible.
- When necessary, custom code may be used to implement workflow, data validation, and implementation of business logic, roll-ups and to circumvent Application limitations or governor limits.

1.2.1.2. Communities User Experience and Interface Design

SFDC will work with Customer to establish a custom user interface ("UI") design concept and deliver design wireframes, comps and all needed graphic elements to facilitate the development of custom UIs (as defined in Section *User Experience and User Interface Design* below).

1.2.2. User Experience and User Interface Design

SFDC will work with Customer to establish a design concept and deliver design wireframes, comps and needed graphic elements to facilitate the development of custom user interfaces for the Communities functionality set forth above.

1.2.2.1. User Interface (UI) Design

SFDC will design up to ten (8) custom wireframes for the following external facing community pages. The wireframes helps understand how a page and its components conceptually look, act, and react. The accepted wireframes serve as the basis for developing user interface comps in the next phase. Comps are intended to represent the final appearance of each screen in the digital experience.

- Wireframes (up to 8)

Customer Community:

- Home Page
- Public Application

salesforce services

- Public Registration for authenticated access
- Login and home page with client profile and list of cases for self-servicing
- Case submission and status
- Up to three (3) additional wireframes, prioritized by mutual agreement between SFDC and Customer

Customer may be asked to participate in tasks and activities required to complete each of these deliverables and will be asked to review and approve each of them.

1.2.3. System Documentation

The details of the accepted User Stories will represent details of the business functional requirements.

1.3. Out of Scope and Change Orders

Any work not specifically set forth as Professional Services within this SOW is out of scope of this SOW, including the following out of scope activities:

- Quality assurance for a production deployment.
- Change Management and training activities.
- Implementation of mobile application configuration.
- Legacy data migration.
- SSO configuration on external systems.
- English language only.
- Development of community reports and dashboards.
- Customer will conduct all Change Management activities including Stakeholder Analysis, End User Communications and Adoption Planning and Execution.
- Data cleansing or de-duplication.
- Custom branding requiring customization outside the scope of the UI defined wireframes.
- Any development required in external applications outside of Salesforce is the responsibility of the customer.

Changes to the scope of this SOW require a fully executed Change Order.

2. Approach

The Professional Services provided pursuant to this SOW will be delivered in the five stages listed below. Specific activities by stage are also outlined below.

2.1. Plan Stage

The Plan stage is intended to initiate the project, set expectations regarding how it will be delivered and monitored, and to discuss the boundaries around it. The purpose of the project and expected business outcomes will be confirmed during the Plan stage. The Plan stage will also establish the way the project will be managed and the plan for execution (scope, schedule, quality, budget).

The Plan stage is comprised of the following major activities:

2.1.1. Professional Services Setup and Project Team Alignment

The SFDC project team will be introduced to Customer following execution of the SOW. The SFDC team will meet with the Customer team to confirm initial understanding of scope, undertake preliminary planning and scheduling, and align roles between the respective SFDC and Customer teams in preparation for structured discovery sessions. Project tracking and control mechanisms will be discussed and agreed.

2.1.2. Methodology Primer

The SFDC project team will conduct a class for the joint SFDC and Customer project team to level set the team on the details of the Adaptive Methodology. At a minimum, the Customer Product Owner and core team members will attend this session. This session will include education on key elements of the Adaptive Methodology. Specifically, the following topics will be addressed:

- Project planning: expectations regarding scope, schedule, budget, project controls and project management standards.

- Expected business outcomes and success measures.
- Solution design: expected discovery activities and plans for how and when solution design will be done, documented and managed.
- Scope management, control and level of flexibility.
- Development process: activities that occur in each Iteration and outside of the Iterations during solution construction.
- Release planning, measuring velocity, predicting capacity, Iteration burn down, release burn up.
- The product backlog: story map and User Story creation, story quality and story point values.
- Team roles and responsibilities.
- User Story acceptance and Iteration demos.
- Final system testing responsibilities, plans and expectations.

2.1.3. Discovery Sessions and Requirements Gathering

SFDC will facilitate a series of discovery sessions for the purpose of understanding the context of the project and the needed functionality. These sessions will be comprised of the appropriate combination of discovery sessions, group requirements sessions, one-on-one interviews, design workshops and job shadowing sessions. These sessions will allow SFDC and Customer to establish the framework that will guide the implementation and to begin creation of the initial product backlog, representing the business needs that the system will satisfy, as defined by the Adaptive Methodology.

2.1.4. Work Breakdown Structure (WBS)

The work to be completed as part of the Professional Services will be reviewed with Customer and enumerated in a WBS, a hierarchical representation outlining 100% of the tangible scope of the project. The WBS is intended to give clarity to the project team, allowing the SFDC team to gain alignment with Customer on what will be delivered.

2.1.5. Story Map

Based on this SOW and information gathered during discovery sessions, SFDC will work with the Customer Product Owner to create a story map made up of the main functional areas to be addressed, typically modeled as a hierarchy and beginning to list the framework of User Stories. User Stories will be further elaborated and finalized in later stages.

2.1.6. Baseline Schedule and Budget

Based on this SOW and information gathered in discovery sessions, together with project team member schedules and calendar events, the project schedule will be reviewed and adjusted as necessary. If appropriate, the planned burn of budget will also be adjusted in kind. This will establish a baseline schedule and budget against which to monitor schedule and budget burn performance.

2.1.7. Planning Documents

SFDC will draft a series of planning documents ("**Planning Documents**") that further establish the scope for the proposed Professional Services. The Planning Documents will be based on the Plan stage activities and will define expectations regarding the later stages of the Professional Services.

The specific documents included in the Planning Documents are set forth in Appendix 1 attached hereto and incorporated herein. The Planning Documents are intended to establish a baseline for how the Application will be designed, configured, customized and developed.

SFDC will review the draft Planning Documents with Customer and Customer will provide comments and feedback promptly. Based on Customer feedback SFDC will publish a finalized set of Planning Documents and Customer shall indicate its acceptance via email or signature in accordance with Section 5.5 (Acceptance) herein.

The approved Planning Documents will provide further detail to this SOW with regards to scope, staffing and delivery dates and will be used as a baseline for managing deliverables, fees and time frame going forward. Any requested changes to the scope will be addressed through SFDC's Change Order process (as defined in Section 5.4 herein).

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2.2. Architect Stage

The Architect stage is intended to establish a high-level architecture as well as to create the necessary design to begin the development effort. Business components and technical components of the solution will be documented in sufficient detail for Customer to understand the expected solution and sign off on it. The high-level architecture and design that is created in this stage will be used to further refine and manage scope, budget and delivery dates.

Some Plan stage and Architect stage activities are expected to occur concurrently.

2.2.1. Discovery Sessions

During Architect stage, discovery sessions will continue, with SFDC facilitating. These sessions will allow SFDC and Customer to further elaborate the requirements, to design the solution and to review the proposed solution design together.

2.2.2. Experience Design (XD)

2.2.2.1.   User Interface Design

SFDC will define and create the custom User Interface ("**UI**") based on the approved wireframes and information gathered in discovery sessions, as well as a Customer-provided style guide if available. The UI design will be expressed as a series of color screen comps or mockups.

As part of the UI design and mockup process SFDC will create UI design options (as specified above) for Customer review, selection and feedback. Customer will select one of the design options and based upon this selection and feedback, SFDC will update and submit revised mockups for final approval.

2.2.2.2.   UX / UI Design Review Sessions

As needed, SFDC will leverage user experience and user interface design review sessions to get feedback on design deliverables and further expand upon the information collected during discovery sessions.

2.2.3. Initial Product Backlog

Based on information gathered during the Plan stage and discovery sessions, SFDC will work with the Customer Product Owner to create the initial product backlog. This will be based on the story map, further elaborating it to include the User Stories that are known and expected to be implemented as part of the solution.

2.2.4. High-Level Technical Solution Design

SFDC will draft a high-level technical solution design and specification documents (see Appendix 1) that specifies the proposed design for the configured Application based on the results of the Plan stage and Architect stage activities. The Design Documents expand upon what was specified in the Planning Documents and describe the overall design and functional Application scope for the remainder of the Professional Services. The specific documents that are included in the Design Documents are set forth in Appendix 1 attached hereto and incorporated herein. The Design Documents are intended to establish a baseline for how the configured Application will be configured, developed and implemented.

SFDC will review the draft Design Documents with Customer and Customer will provide comments and feedback promptly. Based on Customer feedback SFDC will publish a set of Design Documents and Customer shall indicate its acceptance via email or signature in accordance with section *Acceptance* below.

2.2.5. Prototype Build Preparation

During the Architect stage final preparations are made to begin construction of the solution:

- Environments are initialized and configured.
- Development and code management tracking and management systems, as defined and agreed in the Planning Documents, are acquired and set up.
- Sufficient User Stories to begin development are fully elaborated and agreed with Customer to use the estimated capacity of the prototype development team for 2 Iterations.

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2.3. Prototype Construct Stage

The Construct stage (Prototype) leverages the product backlog of User Stories as well as the signed off Planning Documents and Design Documents established in the Plan stage and Architect stage to configure, develop and test the Professional Services over a series of development Iterations.

The Construct stage comprises the following major activities:

2.3.1. Iterative Development

In each Iteration, the development team will perform the following activities:

- Review and select User Stories to include in the Iteration.
- Work with Customer Product Owner to finalize User Story details and acceptance criteria for each included User Story.
- Build and unit test the selected content of the Iteration.
- Finalize and execute test scripts for each selected User Story.
- Gain acceptance of the User Stories delivered in the Iteration based on each User Story's acceptance criteria and documented in the User Story tracking application (e.g., Rally, PM Toolkit, etc), in accordance with the Acceptance section below.
- Conduct an Iteration retrospective to review the results of the Iteration and to identify development process improvements.

2.3.2. Custom User Interface and Graphics Creation

SFDC will create and integrate custom user interface graphics based on the approved Annotated Wireframes the custom functionality identified in this SOW and further defined in the approved Design Documents.

3. Customer Obligations and Assumptions

3.1. General

- Timely and successful performance of the Professional Services pursuant to this SOW requires ongoing collaboration between SFDC and Customer. Customer is responsible for certain key tasks, contributions and timely reviews of SFDC work to maintain the estimated schedule and estimated Professional Services fees.
- Customer shall procure, install, host, test, deploy, monitor and maintain all associated hardware, software (including, without limitation, the Online Services), remote meeting tools, high-speed internet if meetings are held onsite and copyrighted materials, including patches or upgrades required to enable provision of the Professional Services.
- Customer will make available appropriately skilled and knowledgeable Customer resources, including the following resources, to provide active and continuous participation, including timely review, feedback and approvals:

  Executive sponsor
  Project manager
  Product Owner
  Functional lead and business subject matter experts

- Customer will allocate time among Customer project staff, subject matter experts and executive staff as needed for participation in meetings, timely review of documentation and decision-making.
- Customer will define and maintain the list of the business objectives and requirements that will guide the provision of the Professional Services.
- Customer will coordinate on-site, web or conference call schedules for meetings to be held during the term of this SOW.
- Customer is responsible for its use of the deliverables resulting from the Professional Services, including compliance with all applicable laws and license requirements related to the use and / or distribution of such deliverables (e.g. inclusion of any terms, such as privacy policies, conformance to any third party terms (operating system terms, etc.)).
- Customer will provide assistance, cooperation, information, equipment, data, a suitable work environment and resources reasonably necessary to enable SFDC to perform the Professional Services.

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- Customer will identify and enable permissions for SFDC personnel as system administrators or users of Customer's Application instances as reasonably necessary for the provision of Professional Services.
- Customer will be responsible for executing on overall program management responsibilities.
- If Customer requires additional security or internal IT reviews not specifically called out in this SOW, a Change Order will be required for the additional scope.

3.2. Adaptive Methodology Customer Obligations and Assumptions

- Customer will participate in planning, discovery and design sessions as needed to facilitate development of Planning Documents and Design Documents and will review and sign off on the same in a timely manner prior to start of the Construct stage.
- Customer will provide an authorized and skilled Product Owner who will be responsible for managing the content of the product backlog, providing content for User Stories, prioritizing stories in the backlog, working with SFDC to determine which stories will be addressed in which Iteration, assisting with the creation of acceptance criteria and accepting each User Story upon demonstration that it meets the acceptance criteria in accordance with Acceptance section below.
- Customer Product Owner will work with SFDC to fully elaborate sufficient User Stories prior to the start of the Construct stage to use the estimated capacity of the development team for at least 2 Iterations.
- Customer Product Owner will represent Customer business stakeholder interests to the development team.
- Customer Product Owner and SFDC will participate in periodic review meetings with Customer business stakeholders throughout the delivery of the Professional Services.
- Customer Product Owner will determine prioritization of User Stories in the product backlog.
- Acceptance criteria in the User Stories will be the basis for expected Application functionality. In the event that Customer testing identifies functional needs not reflected in the acceptance criteria, a defect will be created to describe the functional gap. Customer Product Owner will determine which defects (i.e. which functional gaps) they would like to have addressed as part of the Professional Services as part of the on-going prioritization process. If defects that Customer wishes to address cannot be addressed with the defined resource pool and timeline, a Change Order process will be initiated as set forth below.

3.3. Steering Committee

- Customer agrees to a monthly steering committee meeting to include the following parties: Customer Executive Project Sponsor, Customer PM, SFDC Executive Sponsor and SFDC PM. This meeting will be used to review project status, key open issues and assure alignment between organizations.

4. Schedule and Estimated Professional Services Fees

4.1. Estimated Schedule

Subject to the terms herein, SFDC estimates the timeline for the performance of Professional Services pursuant to this SOW to be four (4) weeks from the start date. Professional Services shall begin on a date to be mutually agreed upon in writing (email acceptable) after this SOW and the Agreement, if applicable, are both fully executed and the Purchase Order, if applicable, is received. Professional Services shall begin no sooner than two weeks after such requirements are met. A preliminary schedule is set forth in Appendix 2 attached hereto, however a more detailed project timeline will be produced as part of this SOW.

4.2. Rates and Estimated Professional Services Fees

Subject to the terms herein, the Professional Services described in this SOW are bid on a time and materials basis. Estimated Professional Services fees pursuant to this SOW are $218,696.80 and are further detailed in Appendix 2 attached hereto.

The following table defines the rate structure for this SOW and the associated estimated fees by resource type to perform the Professional Services described in this SOW during the estimated timeline.

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Resource	Bill Rate		Estimated Hours	Estimated Professional Services Fees	
Engagement Manager	$	244.57	80	$	19,565.60
Senior Business Analyst	$	250.00	160	$	40,000.00
Senior Developer	$	250.00	160	$	40,000.00
Senior Project Manager	$	244.57	160	$	39,131.20
Technical Architect	$	250.00	160	$	40,000.00
UX Designer	$	250.00	160	$	40,000.00
Estimated Total			880	$	218,696.80

If the mutually agreed upon Professional Services start date is rescheduled at Customer's request, SFDC reserves the right to charge a rescheduling fee equal to 10% of the estimated total Professional Services fee under this SOW.

4.3. Invoices

All Professional Services fees, as well as actual and reasonable expenses and taxes, if applicable, associated with the Professional Services will be invoiced monthly and shall be due and payable in accordance with the terms of the Agreement.

4.4. Travel Expenses

Travel expenses and reasonable out-of-pocket expenses, including but not limited to transportation, mileage if driving, hotels, meals if traveling, hotel phone and Internet charges and any necessary copies or postage, are not included in the fees set forth in this SOW and will be invoiced separately at a flat rate of $32,000.

5. General Terms

5.1. Precedence

This SOW and any appendices hereto shall be governed by the terms of the Agreement. In the event of a conflict between any term of this SOW and the Agreement, the terms of this SOW will control.

5.2. Customer Location

The primary customer site at which Professional Services will be performed is as indicated below. Professional Services may be performed at the primary site and other sites.

Street	441 4th Street, NW, Suite 850 North
City, State, Zip	Washington, DC 20001
Country	USA

5.3. Segmentation

Customer acknowledges that this SOW is limited to Professional Services and does not convey any right to use Online Services. Any use of Online Services by Customer will be governed by a separate agreement. Customer agrees that its purchase of Professional Services is not contingent on the delivery of any future Online Service functionality or features, other than Deliverables, subject to the terms of this SOW or on any oral or written public comments by SFDC regarding future Online Service functionality or features.

5.4. Change Order

In order to make a change to the Scope set forth in this SOW, Customer must submit a written request to SFDC specifying the proposed changes in detail. SFDC shall submit to Customer an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services. Upon mutual agreement of the parties, the parties each shall execute an amendment representing the changes to this SOW ("Change Order"). SFDC shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling and fees therefore.

5.5. Acceptance

Upon completion of each Deliverable, SFDC will, as applicable: (a) submit a complete copy to Customer; and (b) at Customer's request, demonstrate its functionality to Customer. Customer is responsible for reviewing and testing all Deliverables in accordance with this SOW pursuant to any acceptance criteria or test plans mutually agreed upon in writing by the parties for such Deliverable. Customer will provide SFDC with written notification of acceptance for each Deliverable promptly upon acceptance; however, failure to reject a Deliverable, as set forth below, will be deemed acceptance. If Customer, in its reasonable and good faith judgment, determines that any submitted Deliverable does not satisfy the agreed-upon acceptance criteria as specified in this SOW or as mutually agreed upon in writing by the parties for such Deliverable, Customer must so notify SFDC in writing within 10 business days after SFDC's submission of the Deliverable, specifying the deficiencies in detail. SFDC will use commercially reasonable efforts to correct such deficiencies and resubmit the Deliverable to Customer as soon as practicable. Customer will again review and test the Deliverable against the agreed-upon acceptance criteria and detail any deficiencies to SFDC in writing within 10 business days after resubmission of the Deliverable. If a Deliverable fails to meet the functional requirements specified in this SOW after its second resubmission to Customer, Customer may either, as its sole and exclusive remedy: (i) again reject the Deliverable and return it to SFDC for further correction and resubmission in accordance with the process described above (if the Deliverable is not accepted after two resubmissions, the matter will be escalated to Customer's executive sponsor for the project associated with this SOW and the SFDC Engagement Manager), (ii) terminate this SOW immediately upon written notice and recover all Professional Services fees paid under this SOW for such deficient Deliverable. If the parties determine that a Deliverable's functional requirements specified in this SOW require modification (for example, due to incorrect assumptions or changed requirements), they will cooperate in good faith to execute a Change Order for such revised requirements.

NOTE: Acceptance of User Stories developed and demonstrated to Customer is an interactive process to which the foregoing does not apply. Rather, Customer must formally accept User Stories either through the tracking application (described in the Iterative Development Section above) or in writing (email acceptable). In the event Customer neither accepts User Stories subject to the foregoing, nor rejects User Stories in writing (email acceptable), then such User Stories will be deemed accepted at the earlier of 10 business days after demonstration of the User Story or 2 business days following the end of the Iteration in which the User Story was completed.

5.6. Termination

Customer may terminate this SOW at any time for convenience upon 10 days' written notice to SFDC. Either party may terminate this SOW for cause: (i) upon 30 days written notice to the other party of a material breach if such breach remains uncured at the expiration of such period or (ii) if the other party becomes the subject of a petition in bankruptcy or any other proceeding relating to insolvency, receivership, liquidation or assignment for the benefit of creditors.

5.7. Customer Cooperation

A. Cooperation. Customer will cooperate reasonably and in good faith with SFDC in its performance of Professional Services by, without limitation:

(i) allocating sufficient resources and timely performing any tasks reasonably necessary to enable SFDC to perform its obligations under each SOW;

(ii) timely delivering any Customer collateral and other obligations required under each SOW;

(iii) timely responding to SFDC's inquiries related to the Professional Services;

(iv) assigning an internal project manager for each SOW to serve as a primary point of contact for SFDC;

(v) actively participating in scheduled project meetings;

(vi) providing, in a timely manner and at no charge to SFDC, office workspace, telephone and other facilities, suitably configured computer equipment with Internet access, access to appropriate and knowledgeable employees and agents of Customer and continuous administrative access to Customer's Online Service account and coordination of onsite, online and telephonic meetings all as reasonably required by SFDC; and

(vii) completing, accurate and timely information, data and feedback all as reasonably required.

B. Delays. Any delays in the performance of Professional Services or delivery of Deliverables caused by Customer may result in additional applicable charges for resource time.

5.8. Payment Obligation

Is a Purchase Order (PO) required for the purchase or payment of the

products on this SOW? Please Select: (Customer to Complete)

	No
	Yes. Please complete the following:

PO Number: _____ PO Amount: _

Please indicate tax status by checking one of the following:

	(1) Exempt (Attach Tax Exemption Form)
	(2) Non-exempt

5.9. General

The terms of this SOW expire on September 15, 2017, unless executed by both parties on or prior to that date. This SOW is subject to the terms and conditions of the Professional Services Agreement found at https://www.salesforce.com/company/psa.jsp, unless Customer has a written professional services agreement with SFDC, or an Affiliate of SFDC, in which case such written professional services agreement will govern ("**Agreement**"). In the event of a conflict between any term of this SOW and the Agreement, the terms of this SOW will control. Capitalized terms used but not defined herein shall have the meanings ascribed to them in the Agreement. This SOW may be signed in counterparts, each of which shall be deemed an original. The effective date of this SOW shall be the later date of execution by the two parties.

IN WITNESS WHEREOF, the parties have caused this SOW to be executed by their duly authorized representatives as identified below.

Customer: DC DSLBD

Authorizing Signature	
Name	
Title	
Date	

Carahsoft Technology

Authorizing Signature	
Name	Aaron Dixon
Title	Government Account Representative
Date	

5.10. Project Contacts

carahsoft

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SFDC Project Manager

Name	
Address	
Telephone		Email	

REQUIRED: Customer Contracts Administrator   (Completed Contracts will be returned to this individual.)

Name	
Address	
Telephone		Email	

REQUIRED: Customer Accounts Payable Contact
(Invoices will be sent to this individual.)

Name	
Address	
Telephone		Email	

carahsoft

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APPENDIX 1: DELIVERABLES

Deliverable	Description
Project Management Plan	Defines the processes by which the project will be managed. The document includes governance processes, risk and issue management and change management.
RACI	Two dimensional matrix aligning project stakeholders with their level of involvement related to each deliverable (Responsible, Accountable, Consulted, Informed).
Baseline Schedule and Budget	Project schedule and budget revised / adjusted based on information gathered in discovery sessions, project team member schedules and
Wireframes	Helps understand how a page and its components look, act, and react. Cover interactions, state changes, display rules, animations, and any other pertinent information.
User Stories / Story Map / Story Sizing	User stories define the scope and estimate of what is to be delivered and managed in the Construct phase. Document backlog of requirement definitions in the form of a user role, what the user desires and why. The user stories will be grouped into logical categories and indicate prioritization of what is included in the next phase versus longer-term backlog. The user stories are prioritized for the next phase. Story points (for all planned sprints) and detailed task estimates (first two sprints) are developed. A prioritized set of user stories to be leveraged for the
High-Level Technical Solution Design	Documents the Application modules to be configured, customized, the architecture diagram and component breakdown, and any custom or external technologies to be developed. In addition, it incorporates future phase architectural decisions and frameworks.
Security and Profile Matrix	Document that outlines the defined user roles and what features, functions, and data they can access.

APPENDIX 2: ESTIMATED PROFESSIONAL SERVICES HOURS AND FEES PROFESSIONAL SERVICES SUMMARY

Resource	Bill Rate	Estimated Hours	Estimated Professional Services Fees
Engagement Manager	$ 244.57	80	$ 19,565.60
Senior Business Analyst	$ 250.00	160	$ 40,000.00
Senior Developer	$ 250.00	160	$ 40,000.00
Senior Project Manager	$ 244.57	160	$ 39,131.20
Technical Architect	$ 250.00	160	$ 40,000.00
UX Designer	$ 250.00	160	$ 40,000.00
Estimated Total		880	$ 218,696.80

PROPOSED WORK PLAN

Project	Sprint	Week	Resource Days					
			Engagement Manager	Senior Project Manager	Senior Business Analyst	Technical Architect	UX Designer	Senior Developer
Contractor								
Prepare		0						
Architect		1						
Architect		2	2.5	5.0	5.0	5.0	5.0	5.0
Architect		3	2.5	5.0	5.0	5.0	5.0	5.0
Architect		4	2.5	5.0	5.0	5.0	5.0	5.0
Construct	1	5	2.5	5.0	5.0	5.0	5.0	5.0
Construct		6						
Construct	2	7						
Construct		8						
Validate		9						
Validate		10						

APPENDIX 3: CHANGE CONTROL PROCESS

The following provides a summary of the process to follow if a change to this SOW is desired:

- A project change request ("Change Request") will be the vehicle for communicating change. The Change Request must describe the change, the rationale for the change and the effect the change will have on the Professional Services.
- The designated Customer project manager or SFDC project manager will review the proposed change and determine whether to submit the request to the other party.
- Both the Customer and SFDC project managers will review the proposed change and either approve it for further investigation, or reject it. The investigation will determine the technical merits and the effect on the charges, schedule, and other terms and conditions of the SOW that may result from the implementation of the Change Request. The parties will then decide either to accept or to reject the Change Request.
- A written Change Request Form (see the Change Request Form below) must be signed by both parties to authorize implementation of the Change Request.
- Once approved, a fully executed Change Order related to this SOW will be required in order to implement the requested change.

APPENDIX 3 (CONTINUED)

Change Request Form	
Project:	Project Manager:
Phase:	Date Assigned:
Issue #:	Assigned to:
Title:	Date Due:
Submitted Date:	Closed Date: ___/___/_____
Description Of Change	
☐	
Alternatives	
☐	
Impact Analysis	

For a Change Request, this field should include:

- • Scope:
- • Deliverables:
- • Schedule:
- • Budget:
- • Resources:
- • Risk:
- • Priority:

Dependencies

☐

Recommendation

☐

Related Documents

☐

Resolution

☐

SFDC Project Manager	Signature	Date
☐ Approved ☐ Not Approved oject Manager ☐Name: Pr _____		____/____20__

Customer Acceptor	Signature	Date
☐ Approved ☐ Not Approved Assigned Name: ☐_____		____/____20__