

Appendix C.4
Statement of Work 4
To
Contract Number *[XXX-XXX-XXX]*
For
Organizational Change Management
Agency Change Management Pool

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 objective of this Statement of Work is to secure experienced Contractor staff to develop and guide the Program in the administration of an OCM funding pool for stakeholder agency readiness and OCM activities in support of agency-level transformation. **The Program has requested funding for a dedicated pool for agencies, to assist with agency readiness activities to prepare for a successful ERP implementation**

2. Scope of Work and Deliverables

Develop and guide the Program in the creation of an OCM funding pool for stakeholder agency readiness and agency OCM activities that support the One Washington transformation during the 2019-21 biennium. The One Washington OCM pool plan will

- a) Define the scope of eligible agency readiness activities, and where feasible develop or provide OCM templates and tools for use by agencies and thereby reduce the need to recreate wheels,
- b) Establish allocation criteria for an equitable methodology to support agency readiness tasks into the 2019-21 biennium,
- c) Provide clear and timely information to agencies regarding the pool, i.e. how to apply to the Program for OCM pool funds, reporting obligations, etc.
- d) Include the methodology that One Washington will follow to assure that proper rigor, analysis and due diligence are applied to initial agency funding plan submissions as well as reimbursement requests.
- e) Assume that approved agency activities will be reimbursed by the pool upon verified completion.

Assist the Program with the implementation and administration of the OCM pool plan to ensure agency OCM requests are in alignment with criteria for use of pool funds, inclusive of an approach to quality assurance for plan-approved agency-level OCM activities which promotes early mitigation of the risk of poor quality work and schedule delays.

The Contractor must source and utilize state small businesses for this deliverable as described in the Contractor's response.

1. The draft Agency OCM pool plan will be delivered to the Program no later than September 30, 2019.
2. The final Agency OCM pool plan will be delivered to the Program no later than October 31, 2019.
3. Monthly report starting in November 2019 re: activities related to administration, any key learnings, observed risks, etc.

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, 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.

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 for this SOW. The individuals identified for this SOW will be reviewed and approved by the One Washington Transformation Administrator.

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:

- Primary OCM Practitioner – Collocated onsite with the One Washington project team in Olympia, WA at least *[[##]]* days a *[[week/month?]]*
- OCM Practitioner - Collocated onsite with the One Washington project team in Olympia, WA for a minimum of *[[##]]* days a week

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 per Deliverable	Rate	Total
1	OCM Practitioner(s)	<i>[Bidder populate]</i>	Provide draft Agency OCM Pool Plan	<i>[Bidder populate]</i>	<i>[xx]</i>	<i>[\$xxx]</i>	<i>[\$x,xxx]</i>
2	OCM Practitioner(s)	<i>[Bidder populate]</i>	Final Agency OCM Pool Plan	<i>[Bidder populate]</i>	<i>[xxx]</i>	<i>[\$xxx]</i>	<i>[\$xx,xxx]</i>
Subtotal							
#	Role	Name(s)	Deliverable	Activiy/Activities	Hours per Month	Rate	Total
3	OCM Practitioner(s)	<i>[Bidder populate]</i>	Monthly Status Report	<i>[Bidder populate]</i>	<i>[xxx]</i>	<i>[\$xxx]</i>	<i>[\$xx,xxx]</i>
Subtotal							
TOTAL							<i>[\$xx,xxx]</i>

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

[State]

Signature

Print or Type Name

Title
Date

Approved

[Contractor]

Signature

Print or Type Name

Title
Date