



County of Kenosha

Project Name

Statement of Work

Date

Exhibit A – SOW #1  
(Addendum XX)

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# 1. Executive Summary

This Statement of Work (“SOW”) sets forth the services and deliverables that Vendor shall provide to the County of Kenosha (“County”) and includes a description of the scope, roles, responsibilities, tasks and anticipated timeframe for the Project Name. The Master Professional Services Agreement executed by the parties (“Agreement”) and this SOW will be the governing project documents for project execution as mutually agreed to by both parties.

Below is a brief summary of the expected project:

- XXXXX
- XXXXX

## 2. Scope of Services

### a. Software / Modules

Below is an overview of the areas relevant to the project scope of work that is included in this statement of work (SOW).

- XXXXX
- XXXXX

This project is focused on XXXXX, and does not include future business process and system configuration improvements or additional changes and/or customizations.

### b. Data Conversions

The following data will be converted from the County's existing XXXXX:

- XXXXX
- XXXXX

### c. Interfaces

#### Overview

XXXXXX

- XXXXX
- XXXXX

- **Outbound API Interfaces:** It is assumed that with outbound API interfaces (Dynamics 365 to third party system) the third party system will consume the Dynamics 365 webservice. If desired, Crowe and the County can determine if there are interfaces that may require Dynamics 365 to consume third party APIs to push information as needed – and if so, Crowe and the County will work together to determine the scope and possible additional cost. *Note, Crowe assumes that any outbound interface, leveraging an API, will utilize the Dynamics JSON-based*

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## Interface Upgrade Details

1. **XXXXXX** (*RFP Interface Attachment X - No. X*)

**Source:** XXXXX  
**Target:** XXXXX  
**Frequency:** XXXXX  
**Summary:** XXXXX

Below is a summary of the expected interface:

- XXXXX
- XXXXX

2. **XXXXXX** (*RFP Interface Attachment X - No. X*)

**Source:** XXXXX  
**Target:** XXXXX  
**Frequency:** XXXXX  
**Summary:** XXXXX

Below is a summary of the expected interface:

- XXXXX
- XXXXX

3. **XXXXXX** (*RFP Interface Attachment X - No. X*)

**Source:** XXXXX  
**Target:** XXXXX  
**Frequency:** XXXXX  
**Summary:** XXXXX

Below is a summary of the expected interface:

- XXXXX
- XXXXX

d. Reporting

- XXXXX
- XXXXX

e. Pre-Formatted Forms

- XXXXX
- XXXXX

f. Workflows

- XXXXX
- XXXXX

Business Area	Workflow
	•
	•
	•

g. Customizations

- XXXXX
- XXXXX

---

Area of Customization

- XXXXX
- XXXXX

Area of Customization

- XXXXX
- XXXXX

## h. Security

### Migrating User Security Accounts

- **Active Directory**
  - XXXXX
  - XXXXX

## 3. Technical Architecture / Environments

Summary.

Diagram Picture

- XXXXX
- XXXXX

## High-Level Architecture

Summary.

Diagram Picture

- XXXXX
- XXXXX

## 4. Implementation

### a. Upgrade / Implementation Approach

Summary.

Diagram Picture

- XXXXX
- XXXXX

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## 1. Prepare



**Prepare**

### 1.1 Initial Planning and Preparation

Description

### 1.2 Kickoff Meeting

Description

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## 2. Upgrade



Upgrade/  
Configure

### 2.1 Establish Technical Infrastructure

Description

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## 3. Validate



Validate

### 3.1 Update Procedure Documents

Description

### 3.2 Prepare for XXXXXX

Description.

**Homework Exercises:** Description

- XXXXX
- XXXXX

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## 4. Deploy



Deploy

### 4.1 Train End Users

Description

### 4.2 Develop and Execute the Cutover Plan

Description

### 4.3 Conduct Readiness Review / Cutover to New System

Description

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## 5. Support



Support

### 5.1 Post-Cutover Support (90 days post-cutover)

Description

- XXXXXX
- XXXXXX

### Automated Test Scripts

Description

- XXXXXX
- XXXXXX



---

### **Assumptions**

- XXXXXX
- XXXXXX

### Data / Configuration Upgrade Scripts

- XXXXXX
- XXXXXX

### **Assumptions**

- XXXXXX
- XXXXXX

### Interface Methodology Overview

Description

- XXXXXX
- XXXXXX

### Interface Responsibilities

**Vendor**

- XXXXXX
- XXXXXX

**County**

- XXXXXX
- XXXXXX

## b. Project Management

Description

- XXXXXX
- XXXXXX

Below is a summary of the key project management activities we will work through together.

- XXXXXX
- XXXXXX

### **Communication**

**Status Monitoring and Reporting**

### Summary

The status report will include the following:

- Brief description of major accomplishments from the previous week;
- Brief description of key milestones, dates and responsibilities;
- Brief description of upcoming activities and expected goals; and
- Brief description of any concerns or issues.

### Meetings

Description

Below are the key items typically included:

### Issue Management

Description

Below are the key items typically included:

- Issue ID
- Issues Title / Description
- Category / Area
- Type of Issue
- Priority
- Owner
- Date
- Status

### Risk Management

Description.

The status of project risks will be communicated as part of the project status reporting.

- Risk ID
- Risk Title / Description
- Type of Risk
- Probability
- Impact
- Risk Response
- Owner
- Date
- Status

### Project Change Management

Description

The critical results of change management include:

- Documented and understood scope, purpose, and benefit for the change;
- Documented evaluation of the impact to project cost, schedule, and/or scope; and
- Documented change decisions.

The project change management process involves the following steps & key decision points:

- XXXXXX
- XXXXXX

### Quality Assurance

Description

- XXXXXX
- XXXXXX

### Acceptance (Milestones/Deliverables)

Description

- XXXXXX
- XXXXXX

**Project Manager Roles**

**Vendor Project Manager Role**

- XXXXXX
- XXXXXX

**County Project Manager Role**

- XXXXXX
- XXXXXX

**Assumptions**

- XXXXXX
- XXXXXX

c. Training / Knowledge Transfer

**Overview**

Description

**Users and Learning Activities**

Summary

- **Core users:** Business users (subject matter experts) that will be intimately involved throughout the upgrade project and will be validating the upgraded system.
- **End users:** Business users that will be trained once the system is upgraded (just prior to cutover).
- **Technical users:** The technical staff members that will need to help support the upgraded system when the project is complete.

**Core Users:**

Description

**Detailed Procedure Documents and Homework Exercises**

- XXXXXX
- XXXXXX

**Technical Training and End User, Instructor Led Training**

- XXXXXX
- XXXXXX

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Course Description	Duration (per class)

**End Users:**

- Description

**Technical Users**

- Description

**Vendor Training Responsibilities**

Summary.

- XXXXXX
- XXXXXX

**County Training Responsibilities**

Summary

- XXXXXX
- XXXXXX

**d. Project Schedule**

Description

Below are some of the key activities/milestones for the County to maintain the above schedule:

- XXXXXX
- XXXXXX

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## 5. Team Structure / Roles & Responsibilities

Summary

Diagram

### a. Vendor Roles and Responsibilities

Summary.

- XXXXXX
- XXXXXX

### b. County Roles and Responsibilities

Summary.

- XXXXXX
- XXXXXX

### County Responsibilities Summary

Summary

- XXXXXX
- XXXXXX

## 6. Pricing

### a. Implementation Services

We have provided a fixed fee for each deliverable milestone for the services included in this statement of work for the **Project Name**, inclusive of limited travel expenses for end user training activities only. Below we have outlined the deliverables associated with each payment milestone. Upon conclusion of each deliverable milestone, **Vendor** will work with the County to accept and sign-off on the deliverable milestone. The County sign-off on a deliverable milestone will constitute acceptance. Upon the County sign-off for each of deliverable milestone, **Vendor** will invoice the County for the deliverable milestone.

Phase	DED	Amount	Methodology Step(s)	Anticipated Completion
<b>Prepare</b>	DED 1: Initial Planning / Kickoff Meeting	\$0.00	1.1 Initial Planning & Preparation 1.2 Kickoff Meeting	
<b>Upgrade</b>	DED 2: Initial Environment Setup (Development, Test)	\$0.00	2.1 Establish Tech Infrastructure	
	DED 3: Name	\$0.00	2.2 Execute Code Upgrade	
	DED 4: Name (part 1) **	\$0.00	2.3 Upgrade Custom Items	
<b>Validate</b>	DED 5: Name (part 1)	\$0.00	3.1 Update Procedure Documents 3.2 Prepare for Conference Room Pilot	
	DED 6: Name (part 2)	\$0.00	3.1 Update Procedure Documents 3.2 Prepare for Conference Room Pilot	
<b>Deploy</b>	DED 7: End User Training (first set of classes)	\$0.00	4.1 Train End Users	
	DED 8: End User Training (second set of classes)	\$0.00	4.1 Train End Users	
	DED 9: Cutover Preparation & Execution	\$0.00	4.2 Develop / Execute Cutover Plan 4.3 Conduct Readiness Review / Cutover to New System	
<b>Support (90 days)</b>	DED 10: Post Cutover Support (first month)	\$0.00	5.1 Post Cutover Support	
	DED 11: Post Cutover Support (second month)	\$0.00	5.1 Post Cutover Support	
	DED 12: Post Cutover Support (third month)	\$0.00	5.1 Post Cutover Support	
<b>Other (Post Implementation)</b>	DED 13: Name	\$0.00		

**TOTAL            0.00**

## b. Hours

Description

## c. Software / Maintenance

Description

## d. Additional Services

Description

Role	Hourly Rate

## e. Reductions In Scope

Description

# 7. Deliverable Expectation Documents (DED's)

## a. DED Acceptance

### DED Acceptance (for all deliverables):

- **Acceptance Form:** An acceptance form will be developed and mutually agreed to between **Vendor Name** and the County to be utilized for DED acceptance. For each of the DEDs, Crowe will work with the County to obtain signoff. It is expected that the form will contain the following types of information:
  - DED ID/Name
  - Date
  - County Owner (for signoff)
  - Description/Overview
  - Required Changes/Updates (only if needed)
  - Approval (accepted as complete, accepted pending required changes, not accepted)
  - Additional Notes (only if needed)
  - Signature with date
- **Acceptance Criteria:** All deliverables will be formally reviewed and accepted by the County

using the Deliverable Expectation Document (DED) below as a guide. Deliverables shall be accepted by the County when:

- The deliverable contains the components specified in the Scope / Deliverable Outline of the DED.
- The deliverable has been reviewed for and meets acceptable standards for content, quality, formatting and spelling.
- **Vendor Name** and the County have agreed to and accepted the content of each outlined component, or **Vendor Name** and the County have agreed that the content is no longer required for acceptance.
- **Vendor Name** and the County have resolved identified content or quality issues.

**Example Acceptance Form**

<b>Date</b>		
<b>Client Owner</b>		
<b>DED</b>		
<b>Description/ Overview</b>		
<b>Required Changes/Updates (if needed)</b>		
<b>Additional Notes (if needed)</b>		
<b>Client Owner Signature</b>	<b>Date</b>	<b>Approval</b>
		<input type="checkbox"/> <b>Accepted as Is/Complete</b> <input type="checkbox"/> <b>Accepted, Pending Required Changes Above</b> <input type="checkbox"/> <b>Not Accepted (see notes)</b>



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## b. DED Form Example

### DED 1: Name

**Phase:** Prepare

**Objective/Purpose:**

Summary

**Scope / Deliverable Outline:**

- Project Plan
  - XXXX
  - XXXX
  
- Kickoff Meeting – Summary
  - XXXX
  - XXXX

**Vendor Role:**

- Project Plan – Description
- Kickoff Meeting – Description

**County Role:**

- Project Plan – Description
- Kickoff Meeting – Description

**Notes:**

- XXXX
- XXXX

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## DED 2: Name

**Phase:** Prepare

**Objective/Purpose:**

Summary

**Scope / Deliverable Outline:**

- Project Plan
  - XXXX
  - XXXX
- Kickoff Meeting – Summary
  - XXXX
  - XXXX

**Vendor Role:**

- Project Plan – Description
- Kickoff Meeting – Description

**County Role:**

- Project Plan – Description
- Kickoff Meeting – Description

**Notes:**

- XXXX
- XXXX

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## 8. SOW Approval

**County of Kenosha**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Vendor Name**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date