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Appendix C

Department of Information Resources

Managed Services for Telecommunications Contract

Sample Statement of Work

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ATTACHMENT 1

STATEMENT OF WORK (SOW)

FOR

Managed Services for Telecommunication

Engagement Name

DIR Customer Name

DATE

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1. Introduction

Describe the managed service to be delivered and the characteristics of the services at a summary level. The statement of work (SOW) is unique and distinct for each engagement.

2. Background

Explain why the Customer is contracting for this managed service. Provide useful information regarding the Customer organization, engagement history, future plans or any other relevant information regarding the work to be performed.

3. Scope

Sample Content

3.1 Engagement-Based Services

- Scope of work
- Engagement risks, assumptions and constraints
- Roles and responsibilities
- Detailed description of managed service
- Acceptance criteria
- Engagement completion criteria
- Engagement schedules to be achieved by vendor
- Relevant quality processes that will apply, such as change management, acceptance, and risk and issue management

3.2 Outsourced Services

- Scope of services to be delivered
- Acceptance criteria
- Service-level objectives
- Key performance indicators
- Service-level agreements (SLAs)
- Service-level management

4. Services

4.1 Sample Content

(Example – at a minimum, Customers should consider the following items when developing their SOW)

- Managed Services must be provided on the dates specified. Any changes to the delivery date must have prior approval (in writing) by the Customer contract manager or designate.
- All managed services must be submitted in a format approved by the Customer contract manager.
- If the managed service cannot be provided within the scheduled time frame, the Vendor is required to contact the Customer contract manager in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project.
- A request for a revised schedule must be reviewed and approved by the Customer contract manager before placed in effect. Contract Terms and Conditions may dictate

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remedies, costs, and other actions based on the facts related to the request for a revised schedule.

- The Customer will complete a review of each submitted managed service within specified working days for the date of receipt
- A kickoff meeting will be held at a location and time selected by the Customer where the Vendor and its staff will be introduced to the Customer.

4.2 Sample Delivery Schedule

No.	Item	SOW Paragraph	Due Date	Recipient
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				

5. Reports and Meetings

Sample Content (Example – at a minimum, Customers should consider the following items when developing their SOW)

- The Vendor is required to provide the Customer contract manager with weekly written progress reports of this engagement. These are due to the Customer contract manager by the close of business on the *specify day* each week throughout the life of the project
- The progress reports shall cover all work performed and completed during the week for which the progress report is provided and shall present the work to be performed during the subsequent week.
- The progress report shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem will be resolved.
- The Vendor will be responsible for conducting weekly status meetings with the Customer contract manager. The meetings will be held on *specify day* of each week - at a time and place so designated by the Customer contract manager - unless revised by the Customer contract manager. The meetings can be in person or over the phone at the discretion of the Customer contract manager.

6. Service Level Agreement

The items listed below are suggestions for areas to be considered for service levels and incorporated into the SOW service level agreement.

- Security (as defined by customer)
- Quality (as defined by customer)
- Availability (data, system, and components)
- Performance (transmission, response, or completion times)

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- Meantime to Resolution (MTR)
- Business Continuity
- Required communications (meetings, reports, calls, emails)
- Required documents (plans, estimates, schedules, analyses)
- Degree of accuracy of estimates (schedule, budget, resources, total)
- Effective risk management and response (adherence to plans)
- Effective scope management and change control (adherence to plans)
- Data quality (fitness for use, accuracy, precision, completeness)
- Ad hoc query response (usually written in terms of averages)
- Reliability (queries generate same valid results)
- Consistency (calculations and definitions are consistent regardless of source or function)
- Acceptable usage (query controls)
- Correct mapping of old to new (no functions or data lost that were not planned to retire)
- Previous software, system, or service retired on time

7. Period of Performance

Specify the period of performance in which the Vendor will conduct and complete the work associated with the SOW.

8. Invoices

Describe the Vendor's responsibilities for invoicing Customer including invoice content, frequency/schedule and instructions for submitting invoices. Payments will be made in accordance with Appendix A of the DIR-TSO-3909 Contract.

9. Customer/Vendor-Furnished Equipment and Work Space

Specify what equipment and/or work space the Customer will provide or the expectations of what the Vendor will provide.

10. Additional Customer Terms and Conditions

List any additional terms and conditions required by the Customer. Customers may negotiate the terms and conditions of a SOW to suit their business needs so long as the SOW terms and conditions do not conflict or weaken the DIR master contract.

11. Vendor Response

Sample Content (Example – at a minimum, Customers should consider the following items when developing their SOW)

- All written managed services proposed must be phrased in terms and language that can be easily understood by non-technical personnel (e.g., laypersons without subject matter expertise)
- All document managed services proposed must be in formats (hard copy and electronic) as specified by the Customer - at a minimum, the formats must be in industry accepted standards (e.g., MS Word, MS PowerPoint, MS Project)
- The Vendor must demonstrate its knowledge and expertise of the environment (e.g., platforms, software, applications, network, tools, etc.) for which work is to be performed
- All items of this agreement shall be done in accordance with the Service Level Agreement.

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Sample Content

- Agreement to confidentiality and legal statements
- Vendor staff capabilities specific to this SOW:
  - Organization chart
  - Management team resumes
  - Key personnel resumes
- Vendor's services capabilities:
  - Outline of capability to deliver the required services, including process, functional and technical expertise
  - Agreed-on SOW for managed services
  - Engagement plans for project services or transition
- Project management plan addressing the tasks specified in the SOW

12. Pricing

The main purpose of this section is to detail the pricing for the deliverables-based services. Vendors should also provide a summary of any assumptions and exclusions.

Sample Pricing Sheet

Engagement No.	Engagement Name	Price

13. Response Submission Requirements

Sample Content

- SOW schedule of events: deadline for questions, deadline for answering questions, response due date
- Address for response submission
- Number of copies
- Mandatory response contents