



**RFP # C000979 Salesforce Professional Services EA
Attachment 11 – Statement of Work**

SALESFORCE Consulting Partner

Statement of Work for

Prepared for
New York State Office of Information Technology Services (ITS)
Swan Street, Core 4
Albany, New York 12223

xx/xx/2026

As provided in the **Salesforce Professional Services Enterprise Agreement No. C000979**, ("Agreement"), and unless otherwise required by law or a court of competent jurisdiction to release this information, the information in this Statement of Work ("SOW") shall not be disclosed outside of ITS and shall not be duplicated, used or disclosed in whole or in part for any purpose other than to evaluate this proposal, provided that if a contract is awarded to **Enter vendor name** as a result of or in connection with the submission of this SOW, ITS shall have the right to duplicate, use or disclose the information within the Enterprise to the extent provided by the contract. This restriction does not limit the right of ITS to use the information contained in this SOW if it is obtained from another source without restriction.

Enter vendor name
Address Line 1
City, State Zip Code



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1.0 EXECUTIVE OVERVIEW

Overview to be provided unique to service/scope of work

This SOW and the ITS/ Salesforce Professional Services Enterprise Agreement Contract No. C000979 (“Agreement”) as amended, and any applicable Attachments, represent the complete agreement regarding the subject matter herein and replaces any prior oral or written communications between ITS and Enter vendor name. It is understood and agreed that this SOW is placed under the terms and conditions of Agreement # C000979 between the Enter vendor name and ITS, as amended, and that the provisions of that Agreement supersede any inconsistent provisions of this SOW.

The following Exhibits are incorporated as part of this SOW:

- Exhibit A – PROCEDURES FOR CHANGES IN SCOPE / ESCALATION
- **Exhibit B – DELIVERABLE GUIDELINES (OMITTED)**
- **Exhibit C – DELIVERABLE REVIEW AND SIGN OFF PROCEDURE (as needed)**
- **Exhibit D – _____ (as needed)**

The investigation and implementation of changes may result in modification to the estimated schedule, charges, and/or other terms of this SOW. Requests for such services will be handled according to the procedures described in **Exhibit A, Procedures for Changes in Scope / Escalation**.

The production of reports or meetings described as deliverables in this SOW may be modified by mutual agreement of ITS and Enter vendor name.

1.1 PROJECT SCOPE

1.1.1 SOLUTION DESCRIPTION (AS APPLICABLE TO PERFORMANCE BASED SERVICES)



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1.1.2 PROPOSED PROJECT ORGANIZATION (AS APPLICABLE)

Enter vendor name will perform the tasks and deliverables as described above using:

Describe consultants:

1.1.3 PROJECT PLACEHOLDERS (AS APPLICABLE)

1.2 KEY ASSUMPTIONS

This SOW with its estimated schedule and charges is based on the assumptions listed below. Deviations from these assumptions may affect the successful provision of services and may result in changes to the tasks, schedule, and charges. Changes that arise during the proposed project will be managed through the procedure described in Exhibit A, Procedures for Changes in Scope / Escalation.

1.3 Enter vendor name RESPONSIBILITIES

Under this SOW, Enter vendor name will perform the tasks described in the sections below.

1.3.1 [PROJECT MANAGEMENT] (Sample Statement of Work below)

Description
The purpose of this task is to provide direction and control of Enter vendor name project personnel and to provide a framework for project planning, communications and reporting, procedural and contractual activity. Enter vendor name will perform the following subtasks: • Review project goals and objectives, this SOW, and the contractual



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- responsibilities of both parties with the ITS Project Manager. - Review areas of risk and define mitigation plans with the ITS Project Manager. - Maintain project communications through the ITS Project Manager. - Establish documentation and procedural standards for project deliverables. - Prepare a project plan for performance of this SOW which defines the tasks, responsibilities, milestones and estimated schedule. - Measure and evaluate progress against the project plan with the ITS Project Manager. - Resolve deviations from the project plan or estimated schedule, which may be caused by <u>Enter vendor name</u>. - Conduct regularly scheduled project status meetings on a timetable agreed to by <u>Enter vendor name</u> and ITS. - Prepare and submit status reports, in conjunction with project status meetings, to the ITS Project Manager. - Work with the ITS Project Manager to administer the process defined in Exhibit A-1, Change In Scope Procedures, as necessary. - Coordinate and manage the activities of <u>Enter vendor name</u> project personnel. - Perform issue management and tracking.			
Deliverables			
- Status Meetings - Status Reports - Time Reports			
Completion Criteria			
These tasks will be considered completed when performed as described and accepted by the ITS Project Manager in accordance with this SOW's Exhibit C, Deliverable Review and Sign Off Procedure.			
Costs			
Resource	Hourly Rate	Estimated Effort	Total
_____ Consultants, specializing in _____	\$ _____.	_____ hours	\$ _____.
_____ Consultants, specializing in _____	\$ _____.	_____ hours	\$ _____.
Totals:		_____ hours	\$ _____.

1.4 ITS RESPONSIBILITIES

The successful completion of the proposed project depends on the full commitment and participation of ITS management and personnel.



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The responsibilities listed in this section are in addition to those responsibilities specified in the Agreement and are to be provided at no charge to **Enter vendor name**. **Enter vendor name**'s performance is dependent upon the following responsibilities being fulfilled by ITS.

1.4.1 ITS PROJECT MANAGER

Prior to the start of this SOW, ITS will designate a person called the ITS Project Manager who will be the focal point for all **Enter vendor name** communications relative to this project and will have the authority to make binding decisions and act on behalf of ITS in matters regarding this project. The ITS Project Manager's responsibilities include, but are not limited to, the following:

- Serve as the interface between **Enter vendor name** and all State departments participating in the project.
- Manage ITS personnel and responsibilities for this project
- Attend scheduled project meetings.
- Obtain and provide information, data, documents, decisions and approvals within timeframes agreed to by ITS and **Enter vendor name** Project Managers.
- Schedule and secure attendance of all required ITS personnel as required for interviews, meetings and work sessions. This is expected to include various key executives for one-on-one interviews and various subject matter experts and technical personnel for the work sessions. Consolidate and reconcile feedback from ITS representatives when appropriate and/or necessary.
- Resolve deviations from the estimated schedule, which may be caused by ITS.
- Help resolve project issues and escalate issues within ITS as necessary.
- Work with the **Enter vendor name** Project Manager to administer the process defined in **Exhibit A, Procedures for Changes in Scope / Escalation**, as necessary.

1.4.2 OTHER RESPONSIBILITIES AS APPROPRIATE:

1.4.2.1 OFFICE SPACE AND OTHER FACILITIES

ITS will provide appropriate meeting rooms, office space, office supplies, furniture, telephone, clerical assistance, machine time and other facilities for the **Enter vendor name** project team while working on ITS premises. These facilities shall be provided as determined by the ITS Project Manager. **Enter vendor name** project team members shall observe ITS work rules.

1.4.2.2 LAWS, REGULATIONS, AND STATUTES

ITS is responsible for the identification of, interpretation of, and its compliance with any applicable laws, regulations, and statutes that affect ITS' applications or business. For services provided at ITS locations, ITS will permit posting of any notifications required by applicable law.

1.4.2.3 REQUIRED CONSENTS (AS APPLICABLE)

The Parties will agree, prior to the performance of any obligations under this SOW, upon the consents necessary for such performance ("Required Consents"). ITS is responsible for promptly obtaining and providing to **Enter vendor name** all Required Consents necessary for **Enter vendor name** to provide the Services described in this SOW. A Required Consent means any consents or approvals required to give **Enter vendor name** and its subcontractors the right or license to access, use and/or modify (including creating derivative works) the hardware, software, firmware and other products ITS uses, without infringing the ownership or license rights (including patent and copyright) of the providers or owners of such products.

Enter vendor name will be relieved of the performance of any obligations that may be affected by ITS'



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failure to promptly provide any Required Consents to Enter vendor name.

If additional Required Consents are identified during the course of Enter vendor name 's performance under this SOW, the Parties agree to revise the SOW in accordance with the procedures described in **Exhibit A, Procedures for Changes in Scope / Escalation**.

1.4.2.4 DATA FILE CONTENT AND SECURITY

ITS is responsible for the actual content of any data file, selection and implementation of controls on its access and use, and security of stored data, to the extent and subject to the requirements for security applicable to ITS and to Enter vendor name contained in the C000979 agreement. Any NYS data provided to Enter vendor name by ITS in furtherance of Enter vendor name 's services under this SOW is considered Confidential Information and is not to leave the NYS Data Centers.

1.5 ESTIMATED SCHEDULE

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1.6 DELIVERABLE MATERIALS

The following provides a list of deliverables coming from this SOW's work activities:

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1.7 COMPLETION CRITERIA

Enter vendor name shall have fulfilled its obligations under this SOW when Enter vendor name completes the tasks described in the Enter vendor name Responsibilities section in accordance with their completion criteria, including delivery of the items listed in this Deliverable Materials section of this SOW.



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1.8 **ESTIMATED CHARGES**

All invoices are due in accordance with New York State Finance Law.

1.8.1 **HOURLY MODEL PRICING**

Charges for hourly services are estimated to be \$_____ for an estimated _____ hours of Services at the hourly rates listed in the table that follows. <<Optional: It is expected that Enter vendor name credits previously attained by ITS will be used to pay this entire amount, such that the total value of this SOW shall ultimately be \$_____.>> In accordance with Section 22 ("Payment") of the Agreement, Enter vendor name will invoice ITS monthly for actual hours provided at the specified hourly rates, minus any applied credits, with each monthly invoice reflecting the hours of service provided by Enter vendor name for a single preceding calendar month, i.e. from the 1st day of the month using the standard United States Gregorian calendar, through the last day of the month, which is either the 28th, 29th, 30th, or 31st day of the month, depending on the particular month. Charges for travel and living expenses, charged within NYS contract published guidelines as described in the C000979 Agreement, are included in the rates below.

<< Enter vendor name Responsibilities, Section 1.3.1>> Costs

Resource	Hourly Rate	Estimated Effort	Total
_____ Consultants, specializing in _____	\$_____	_____ hours	\$_____,____.
Totals:		_____ hours	\$_____,____.

<< Enter vendor name Responsibilities, Section 1.3.2>> Costs

Resource	Hourly Rate	Estimated Effort	Total
_____ Consultants, specializing in _____	\$_____	_____ hours	\$_____,____.
Totals:		_____ hours	\$_____,____.

1.8.2 **INVOICE**

Invoices will be remitted to New York State in accordance with the processes described in the "Electronic Contract Payments" section of C000979, as amended.

1.9 **CANCELLATION FOR CONVENIENCE**

ITS retains the right to cancel this SOW without cause, provided that Enter vendor name is given reasonable written notice of its intent to cancel. In the event of cancellation without cause by ITS, ITS agrees to pay for services received prior to the effective date of cancellation.



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EXHIBIT A: PROCEDURES FOR CHANGES IN SCOPE / ESCALATION

A-1: Change in Scope Procedures

In the event a Change in Scope is requested during the delivery of this service the following change control process will be utilized.

- 1) A written description of the changes (Change in Scope) will be prepared jointly by **Enter vendor name** and ITS.
- 2) The document will describe the change and specify any change in the charges, estimated schedule, or other terms.
- 3) The Change in Scope shall indicate the detailed charges and any impact of the change request upon the planned deliverables.
- 4) The Change in Scope must be signed by both **Enter vendor name** and ITS to authorize implementation of proposed changes. If the changes are not acceptable to ITS, the Change in Scope will not be implemented.
- 5) If any Change in Scope would conflict with the Agreement, an amendment to the Agreement will be executed by the parties. Such amendment shall not be effective until approved by ITS.

A-2: Escalation Procedure

The following procedure will be followed if resolution is required to a conflict arising during the performance of this SOW.

- 1) When a conflict arises between ITS and **Enter vendor name**, the project team member(s) will first strive to work out the problem internally.
- 2) Level 1: If the project team cannot resolve the conflict within two (2) business days, the ITS Project Manager and **Enter vendor name** Project Manager will meet to resolve the issue.
- 3) Level 2: If the conflict is not resolved within three (3) business days after being escalated to Level 1, and ITS' Executive Sponsor will meet with the **Enter vendor name** Project Executive to resolve the issue.
- 4) If the conflict is resolved by either Level 1 or Level 2 intervention, the resolution will be addressed in accordance with the Change in Scope Procedure set forth in Exhibit A-1.
- 5) If the conflict remains unresolved after Level 2 intervention, then either party may terminate this SOW in accordance with the terms, and subject to any costs or remedies, as are described in the C000979 base contract.
- 6) During any conflict resolution, **Enter vendor name** agrees to provide Services relating to items not in dispute, to the extent practicable pending resolution of the conflict. ITS agree to pay invoices per the Agreement.



**Office of Information
Technology Services**

KATHY HOCHUL
Governor

DRU RAI
NYS Chief Information Officer

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EXHIBIT B: OMITTED



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EXHIBIT C: DELIVERABLE REVIEW AND SIGN OFF PROCEDURE

With the exception of the Weekly Status Reports, each deliverable document, as defined in the **Exhibit B - Deliverable Guidelines (OMITTED)**, will be approved in accordance with the following procedure:

- One (1) printed draft of the deliverable document will be submitted to the ITS Project Manager. It is the ITS Project Manager's responsibility to make and distribute additional copies to any other reviewers.
- For each deliverable, the ITS Project Manager will either approve the deliverable or provide a written list of requested changes to the **Enter vendor name** Project Manager within five (5) business days of **Enter vendor name** submitting the deliverable. If no response from the ITS Project Manager is received within five (5) business days, the deliverable shall be deemed approved by ITS.
- If a written list of requested changes is received by the **Enter vendor name** Project Manager within five (5) business days of submission of a deliverable, **Enter vendor name** will make the appropriate revisions and will, within five (5) business days, re-submit the updated final version to the ITS Project Manager. When **Enter vendor name** has completed the agreed-upon changes, the document will be deemed accepted. Hours spent implementing the requested changes are considered billable work and will be charged to the contract, provided, however, that no charges will apply in cases where the change requests resulted from **Enter vendor name** errors and/or omissions.

Any conflict arising from this Deliverable Materials Acceptance Procedure will be addressed as specified in the Escalation Procedure set forth in **Exhibit A-2, Escalation Procedure**.



Office of Information Technology Services

KATHY HOCHUL
Governor

DRU RAI
NYS Chief Information Officer

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SIGNATURE PAGE: SOW for _____

Scope of Services, Responsibilities, Completion Criteria, Charges, and other applicable terms: As defined in this SOW.

Maximum Charges: \$xxx,xxx.xx, <<except to the extent the following credits are applied to this SOW: \$xxx,xxx.xx.>>

This SOW is executed pursuant to the terms of the ITS/ Salesforce Professional Services Enterprise Agreement No. C000979.

Enter vendor name agrees to provide the Services described in this SOW provided ITS accept this SOW by signing in the space below. By signing, each signatory affirms they have received appropriate internal approvals to do so. For the ITS signatory, this requires written internal approval on an ITS Internal Review Form including at minimum approvals by representatives from ITS Data Center, ITS Finance, ITS Procurement and Contract Services, and ITS Division of Legal Affairs.

Agreed to: NYS Office of Information Technology Services	Agreed to: Enter vendor name
By: _____ Authorized Signature	By: _____ Authorized Signature
_____ Name (type or print):	_____ Name (type or print):
Date:	Date:
Customer number: Enter #	Reference Agreement number: C000979
Customer address: Swan Street Building, Core 4 Albany, NY 12223	SOW number: SOW # Enter vendor name Office Address: Address Line 1 City, State Zip Code
Project Name:	Estimated Start Date: Select a date Estimated End Date: Select a date

STATE OF NEW YORK	)
	) ss:
COUNTY OF ALBANY	)
On this _____ day of _____, 20____, before me personally came _____, to	
me known, who, being duly sworn by me, did depose and say that (s)he resides in _____	
_____ ; that(s)he is the _____ (the	
President or other officer or director or attorney-in-fact duly appointed) of International Business	
Machines Corporation, the corporation described in and which executed the above instrument; and	
that (s)he signed her/his name thereto by authority of the board of directors of said corporation.	
_____ NOTARY PUBLIC	