

Statement of Work

Sioux City Community Schools

MICROSOFT SUPPORT SERVICES

SOW Prepared By:

Keri McMahon

Heartland Business Systems
Urbandale, IA 50322
Phone: (515) 400-8296
kmcmahon@hbs.net

Kelly Grosskreutz

Heartland Business Systems
Little Chute, WI 54140
Phone: (920) 687-4658
kgrosskreutz@hbs.net

Adam Nowakowski

Heartland Business Systems
Pewaukee, WI 53072
Phone: (414) 216-8852
anowakowski@hbs.net



Project Overview

This Statement of Work (“SOW”) reflects the services and material to be provided by Heartland Business Systems, LLC, (hereinafter referred to as “HBS”) for Sioux City Community Schools (hereinafter referred to as “Customer”).

The objectives of the project are:

- Objective 1: Proactive Management of the Relationship
- Objective 2: Review of our Environment related to Microsoft and Recommendations to Improve
- Objective 3: Microsoft Problem Resolution Services
- Objective 4: Support Assistance for proactive Microsoft-related Projects

Project Scope

HBS will provide the following services (hereinafter referred to as the “Scope”):

In Scope

- **Objective 1: Proactive Management of the Relationship**
 - Weekly project review meetings and monthly Director level review meetings
 - Project Management of all discovery efforts
 - Point of contact for other needs
- **Objective 2: Review of our Environment related to Microsoft and Recommendations to Improve**
 - **Discovery of Microsoft Active Directory**
 - Domain services
 - Certificate services
 - LDAP
 - Federated services
 - Rights management
 - Replication Topology
 - DNS
 - DHCP
 - Audit & Logging
 - Group Policies
 - Time services
 - Backup & DR Strategy
 - Risks: To be identified and called out
 - Recommendations: To be documented, identified, and reviewed with the customer



- **Discovery of Office 365, Tennant, Exchange Online and Azure Active Directory**
 - Tenant review
 - Domain and DNS review (SPF, DKIM, DMARC)
 - Legacy protocols
 - Mail forwarding
 - Shared mailbox access and permission
 - Outbound spam settings
 - Email encryption policy & capabilities
 - Mobile device policies
 - Archive, Retention, Legal policy settings
 - Audit and Logging
 - Monitoring and alerting
 - Backup technology
 - Enterprise App SSO integration
 - App Registrations
 - MFA configuration
 - Conditional Access policies
 - Azure Information Protection Policies (AIP)
 - Data Loss Prevention Policies (DLP)
 - Risks: To be identified, documented, and reviewed with the customer
 - Recommendations: To be identified, documented, and reviewed with the customer
- **Discovery of Microsoft Team and One Drive**
 - Workshop Day 1: Discovery session
 - Capture business goals/objectives
 - Office 365/Modern Overview
 - Brainstorm use cases based on features/functions shown in Office 365
 - Identify power users/early adopters for pilot program
 - Whiteboard Office 365 adoption roadmap/timeline
 - Create up to two Office 365 Groups to support pilot activities
 - Showcase sample Organizational Change Management plan
 - Workshop Day 2: Governance/Migration Risks/Roadmap Review
 - Review and complete SharePoint Governance starter document
 - Review and complete Migration Risks
 - Review Collaboration Roadmap & Capital Estimates
 - Workshop Day 3: Tenant Configuration Review - Teams and One Drive
 - Teams
 - SharePoint
 - OneDrive
- Project Management for all Discovery efforts



- **Objective 3: Microsoft Problem Resolution Services**

- Reactive Support follows a tiered engineering rate structure based on the level of engineer needed to solve the issue.
- Helpdesk calls for support will be answered by Tier 1-2 resources who will attempt to resolve the reported problem.
- If the issue requires escalation, the Helpdesk resource will escalate to a Tier 3 resource. If necessary, Tier 3 resources will open tickets with Microsoft.

- **Objective 4: Support Assistance for proactive Microsoft-related Projects**

- HBS assigns an industry expert to each engagement and tailors the approach to your business needs. As such, all services provided by HBS incur a time and materials expense.
- The Project Manager or TAM (Technical Account Manager) will assign resources per the customer's request based on availability and required skill sets.
- Most Microsoft related engineers will bill at a customer rate of \$159 for support.
- Other engineering services are also available as needed and will be billed at their default rates.
 - Below are the default rates for the various engineering tiers at the time of submittal.

Engineer Work Role	
AV Tech Help-desk Break-Fix Point of Sale Collaboration 1 Project Coordinator I Physical Security Engineer	\$105
AV Engineer 2 Mitel Engineer 2 SMB Engineer HBS Data Center Collaboration 2 Imaging Technician 2 Network Engineer 2 Systems Engineer 2 Physical Security Engineer 2 Cabling Project Manager 2	\$135
AV Engineer 3 Network Engineer 3 Systems Engineer 3 Collaboration 3 Mitel Engineer 3 Physical Security Engineer 3 Apps/Business Consulting 3 Imaging Engineer 3 Infosec Consultant 3 Websites/Kentico Custom Development	\$165
Network Engineer 4 Systems Engineer 4 Collaboration 4 Cloud Architect 4 BI/Data Analytics/SQL 4	\$185
ERP/Dynamics GP 4	\$178
ERP/Dynamics GP 5	\$198
Applications Architect 5	\$195
Systems Architect 5	
Cloud Architect 5	
Infosec Consultant 6 Cloud Architect - Infosec 6	\$225
Infosec Consultant 7	\$295
On Call Pager	\$200
After Hours Rate - Before 8am or after 5pm CST - Weekends & Company Recognized Holidays	1.5x Base Rate



This project is expected to take 10 months to complete from the project kick-off. In the event that an extension to the project timeline is required, the parties shall utilize the Change Order process.

Out of Scope

- Remediation of any issues found in the discovery efforts
 - Any remediation efforts requested will be estimated by the appropriate engineers and quoted to Sioux City CSD.
- Any work or material not specifically identified in this document is not included in this Agreement. The out-of-scope items shall include the following: Deployment of any additional equipment not specifically listed in this SOW or Quote for the project.

Additional Requirements and Conditions

- HBS and Customer will both ensure that adequate resources, for which each respective party is responsible, are available when needed throughout the duration of this engagement. The timely completion of this engagement will depend on the availability of the necessary Customer personnel.
- The assigned Project Manager Adam Nowakowski shall provide updates to Customer regarding the project.
- The account Solutions Consultant Keri McMahon shall be the Customer's primary contact for any questions regarding billing.
- The timely completion of this engagement will also depend on the availability and delivery of the product(s) associated with this SOW from other vendors.
- Any potential dependencies discovered prior to or during implementation will be communicated to Customer and HBS to determine impact to the timing, scope and pricing for the project, and the parties shall utilize the Change Order process as necessary.

Customer Responsibilities

Working Conditions and Access

The items listed below shall apply to the extent applicable:

- Customer will provide a Single Point of Contact with decision making ability to interface with HBS. This person is responsible for signing off on Scope of Work and Change Order documents throughout the project.
- Customer will provide Subject Matter Experts (SMEs) when required by project personnel and/or project activities. If delays in the project timeline are a result of delayed access to SME personnel or any other Customer delays, Customer may be subject to additional charges.
- Customer will provide HBS with access, including all password and logins, to required existing network or system assets listed in the scope.
- Customer will provide HBS with proper access and workspace areas at Customer locations that includes internet, physical and remote access to in scope infrastructure or systems.
- Customer will allow the HBS engineer to connect their computer to Customer network in order to perform their duties. HBS will allow Customer to examine said notebook for current anti-virus software, if needed.
- Customer will allow HBS unescorted access to computer rooms, equipment closets and the general facility. If unescorted access is not available, Customer shall assign access levels appropriately and coordinate escorts.
- Customer will provide adequate access and credentials required for the assessment of all components or systems listed in the scope.



- Customer will provide remote access prior to, and throughout, the project if required.
- Customer will have working Internet access available where the work will be performed.
- Customer is responsible for resolving problems outside the SOW that are beyond the control of HBS. These shall include but not be limited to software/firmware bugs, vendor engineering support cases, hardware failures, telecommunication circuits, server issues, desktop issues, the acts or omissions of any third party, or any other occurrence not caused by HBS. HBS can assist with these out-of-scope issues through the Change Order process or on a time and materials basis.

Testing, Notification and Change Control

- Customer will provide advanced notification of any network outages or changes during the implementation period.
- Customer will assist with the creation of and perform user acceptance testing and post-migration end-point validations.
- HBS and Customer will provide 48-hour notification of any schedule changes.
- Customer will assist with the design, testing and validation of the project Deliverables.
- Customer and HBS agree that work shall progress when Customer staff is not available to participate.

Milestones

The project milestones below are utilized to track progress against the Project Plan.

#	Milestone
1	Review of the Microsoft Active Directory discovery
2	Review of the Office 365, Tennant, Exchange Online and Azure Active Directory discoveries
3	Review of the Microsoft Team and One Drive discoveries

Deliverables

The following are the deliverables HBS will provide to Customer (hereinafter referred to as “Deliverables”) for this project:

Any change to the Deliverables listed below will require a Change Order.

#	Deliverables
1	Microsoft Active Directory discovery documentation
2	Office 365, Tennant, Exchange Online and Azure Active Directory discoveries documentation
3	Microsoft Team and One Drive discoveries documentation
4	Kick off meeting notes
5	Weekly status meeting notes
6	Director level summary notes



Estimated Hours

This is an estimate of hours and, by its nature, is a “best guess,” based on industry standards and best practices, HBS’ experience, and Customer’s needs as communicated thus far. HBS used input from its most experienced team members to generate this estimate. The pricing is set forth on the attached Quote.

#	Task	Description	Est Effort (hrs)
1	Proactive Management of the Relationship	Assuming 10 months of duration	200
2	Review of our Environment related to Microsoft and Recommendations to Improve	Discoveries of: Microsoft Active Directory Office 365, Tennant, Exchange Online Azure Active Directory Microsoft Teams Microsoft One Drive	110
3	Microsoft Problem Resolution Services	Time and Materials (T&M) See Rate Structure for hourly cost	Time & Materials
4	Support Assistance for proactive Microsoft-related Projects	Time and Materials (T&M) See Rate Structure for hourly cost	Time & Materials
	Total Hours		310 hours + T&M as requested

Rate Structure

Objective	Hourly Rate
Objective 1 Project Management-Proactive Management of the Relationship	\$150
Objective 2 Review of our Environment related to Microsoft and Recommendations to Improve	\$159
Objective 3 Microsoft Problem Resolution Services	\$135 Tier 1-2 \$159 Tier 3
Objective 4 Support Assistance for proactive Microsoft-related Projects	\$159

Project Completion

Project will be complete when all Deliverables have been provided to Customer.

Customer will have seven (7) business days to review the Deliverables for the project. If HBS does not receive a written notice of rejection describing the basis for rejection within this period, the Deliverables will be considered accepted.

After the completion of the project, support may be obtained by contacting the HBS Account Manager. Support will be billed at an agreed upon rate for services rendered.



Change Management

Additional products and services beyond the In-Scope deliverables listed above are considered out of scope and require a Change Order executed by the parties before any such work can be performed. Any additions, deletions, or modifications to the Agreement, regardless of change to project value, require a Change Order.

Terms

Binding Agreement. This SOW describes the professional services and/or products, and results to be provided by HBS. Upon execution, this SOW shall be contractually binding on the parties. The HBS Standard Terms and Conditions are also made part of this Agreement.

Order of Precedence. Any ambiguity or inconsistency between or among the statements of this SOW and the Standard Terms and Conditions shall be resolved by giving priority and precedence in the following order:

- Statement of Work
- Standard Terms and Conditions

Work Hours. All professional services work will be completed during the normal business hours of 8:00 am – 5:00 pm Monday - Friday Central Time. Any work occurring after 5:00 pm or before 8:00 am or on weekends is subject to a bill rate of 1.5 times the normal rate, unless the parties agree otherwise in writing.

General. No other promises have been made related to this SOW except for those stated in this SOW. This SOW supersedes all other agreements or promises related to this project and SOW. HBS shall not be responsible for any delay caused by the Customer or its vendors or contractors, equipment or shipping delays, or any other occurrence not caused by HBS.

Confidentiality. Each party may have access to confidential information concerning the methodologies, pricing, and business practices of the other. Neither party shall make any use of such information of the other party except in connection with the exercise of its rights and responsibilities under this SOW.

Approval

An authorized signature below indicates acceptance of all terms of this SOW. The individual signing warrants and represents that the individual is a duly authorized representative with full authority to enter into this Agreement on behalf of the individual's organization.

Sioux City Community Schools

Heartland Business Systems, LLC

Authorized Signature

Authorized Signature

Printed Name / Title

Printed Name / Title

Date

Date