

Statement of Work – Work Authorization



STATEMENT OF WORK #995045

This Order Document and Statement of Work ("SOW") incorporates by reference and is governed by the terms and conditions of the Master Agreement ("Agreement") with an effective date of January 1, 2021 and the Schedule for Professional Services of same date between MRI Software LLC ("MRI") and **County of Lake-Lake County Housing Commission** ("Client") and is effective as of October 1, 2023 ("Effective Date").

1. PROJECT PRE-REQUISITES

1. Before MRI is able to secure/book any MRI resources, provide any firm start and end dates for project the following must be in place.
 - 1.1. The Agreement has been signed by both MRI and the Client.
 - 1.2. The SOW has been signed by the Client and returned to MRI.
2. The start date for this project will be subject to MRI availability at the time this SOW is executed.

2. PORTFOLIO METRICS

The project scope herein assumes MRI consulting services will be leveraged for the following:

METRIC	COUNT
Units	500

Should Client wish to include additional items or make any changes to the project scope of this SOW, the Parties shall follow the change control procedures outlined below.

3. PROJECT SCOPE AND SUMMARY

The table below outlines the MRI software solutions for which MRI will be providing services.

APPLICATION	INCLUDED
Housing Manager.com	Yes

Different approaches to the implementation methodology can be procured. The following table sets out the services relevant to this SOW.

AREA	APPROACH	DETAIL
Training	End User	Web Training

The following training sessions will be provided.

TRAINING	MAXIMUM ATTENDEES
Housing Manager.com	12

4. OUT OF SCOPE

Any item not explicitly noted as in-scope within this document is considered out-of-scope and will need to be manually populated by Client, specifically:



Statement of Work – Work Authorization



1. Any professional services beyond the number of hours documented in the pricing schedule below
2. Any data conversion or import services not specifically identified as in scope
3. Any required interfaces or reports not specifically identified as in scope
4. Development of the standard product(s)
5. Any weekend and out of hours work

5. PROJECT DELIVERABLES

1. MRI has endeavored to provide the most accurate estimates for each deliverable and activity based on the scope provided by the Client. Estimates are subject to change.
2. The project timescales for this project and related deliverables must be formally communicated and agreed upon by MRI and the Client.
3. Any modifications to the scope may be subject to a Project Change Request (PCR)
4. Once training is scheduled you must provide 48-hour notice for any changes. Fees may apply for rescheduling requests made by your Agency within 24 hours of the allotted training session

INITIATE

1. Project onboarding
 - 1.1. Software installation, if applicable
 - 1.2. Set-up internal systems/modules
2. Client kick-off meeting
 - 2.1. Review scope and draft project plan
 - 2.2. Capture success criteria
 - 2.3. Agree team members and communication

BLUEPRINT

1. Overview training
2. Solution design workshops, if applicable
 - 2.1. Presentation of functionality available
 - 2.2. Business requirements discussion
 - 2.3. Discuss to-be solution design
3. Adjustments to the project plan

BUILD

1. Software Setup and Configuration

INSPECT

1. Data validation assistance
2. Application testing assistance
3. Necessary modifications made to solution, implementation plan to be used in the Launch stage.
4. Readiness for live use assessment



Statement of Work – Work Authorization



LAUNCH

1. Application/module installed and configured which meets the agreed business requirements and specifications
2. Deliver end user training (see 'Project Scope and Summary' section herein)
3. Transition to Client Support team

6. RESPONSIBILITIES

MRI

1. Set up the required environments.
2. Prepare and deliver any in-scope training workshops (See 'Training Assumptions' section herein).
3. Provide generic user guides for any in-scope training workshops, if available.

CLIENT

1. Work collaboratively with MRI and other stakeholders to ensure the project is executed as per the scope, timeline, and budget.
2. Client will be responsible for allocating the appropriate number of resources, ensure participation of all required stakeholders, and to complete actions ahead of scheduled workshops.
3. Provide all required details for the setup of roles, users, and provide accurate Configuration decisions.
4. Obtain complete and accurate data in MRI provided format for uploading to the system, validate uploaded data, and adjust migrated data, if applicable.
5. Complete an acceptable level of application testing and then fine tune the system parameters and modeling assumptions.
6. Create any required customized documentation such as user guides and standard operating procedures.

7. TRAINING ASSUMPTIONS

1. Any in-scope training is performed using a standard sample database that provides the necessary representative data so that critical features and functions can be efficiently and effectively trained.
2. Client may request a more personalized training database, including a copy of their production database; however, there will be an incremental fee based on the agreed upon scope to prepare for delivery and update courseware material prior to the scheduled training.
3. End user training may be provided by one of the following options, (see 'Project Scope and Summary' section above)
4. Train the trainer whereby Client training team to be trained by MRI.
5. Direct end user training whereby the whole community to be trained by MRI.
6. No training whereby all users are present in the workshops and no additional training by MRI is included.

8. CHANGE CONTROL PROCEDURES

1. Changes to this SOW may be requested at any time by either party. Since a change could affect the price, schedule changes that incur additional fees, or other terms of the SOW, either of the parties' project managers or project representatives will approve each change prior to implementing the change.



Statement of Work – Work Authorization



2. This procedure will be used by the parties to control changes to the SOW and changes to any previously approved services or deliverables.
3. The requesting party will create a Project Change Request ("PCR") which will serve as the vehicle for communicating the change. The PCR shall describe the change, the justification for the change, additional fees, and the impact will have on the SOW which could include a delay to the first date of live use.
4. The requesting party's designated project manager or project representative will review the proposed change and determine whether to submit the request to the other party.
5. The parties will review the proposed PCR and will either approve, investigate it further or reject the PCR. The PCR will not be binding until signed by both parties.

9. GENERAL ASSUMPTIONS

1. Once the SOW is executed, the assigned MRI resource(s) will be scheduled at a mutually agreeable timetable.
2. MRI is providing consultancy services to implement a software solution and while change management and business process engineering may be required within the Client's organisation, any effort by MRI to lead or play a significant part in advising the Client is out of scope of this SOW.
3. Mutually agreed changes to specifications, whether before, during or after MRI's performance will be handled in writing by processing a PCR and will be contracted at MRI's then-current standard rates. The project team may adjust the project plan based on real world findings and the Client's ability to secure required resources.
4. MRI reserves the right to charge Client a cancellation fee in accordance with the Agreement, if applicable.
5. Client shall make reasonable business efforts to deliver a stable network and computing environment prior to any services engagement. If Client's installation is located in the MRI Software as a Service ("SaaS") platform, access to the Client database and security manager tool will automatically be granted to the consultant(s) assigned to complete the work described in this SOW. If Client's installation is located at Client premises, Client will grant remote access to MRI.
6. Client will work with MRI to resolve all issues related to the project in a timely fashion, and will communicate to MRI any changes in schedule, availability of project personnel, hardware, software, resources or facilities related to the project within a reasonable timeframe in advance of scheduled engagements.
7. Client will manage the availability of appropriate personnel for knowledge transfer as well as decision-making and escalation of decisions.
8. Location of work will be mutually determined by both parties.
9. If the Client does not elect for any applicable optional services, or if no option is selected, the Client understands that no optional services will be provided.

10. PRICING ASSUMPTIONS

1. The professionals services fee contained herein is for MRI resources (or affiliates). Client understands that professional services fees are due as incurred and are billed on a monthly basis at month end. Failure to pay invoices will be handled in accordance with in accordance with the Agreement.
2. The services described in this SOW will be billed on a time and materials or fixed fee basis as outlined in the pricing schedule below. For all time and materials quotations, MRI has endeavored to provide the most accurate times and costs estimates based on MRI Software's current understanding of the work specified



Statement of Work – Work Authorization



by Client. All estimates at this stage in the project are subject to change. MRI reserves the right to invoice Client for up to 10% above cost estimates without a Project Change Request.

3. Client is responsible for payment of any applicable taxes. MRI will invoice Client for any applicable taxes in connection with performance of the SOW in accordance with the Agreement. Any tax amounts are over and above the fees noted in the SOW and any amounts prepaid hereunder for such fees will not be applied to taxes due.
4. Fees do not include travel and lodging expenses. Travel and related expenses (including transportation, hotels, meals, etc.) will be billed at the actual amounts incurred. All travel expenses will be governed by MRI Global Professional Services' Client Billable Expense Guidelines, furnished upon request, unless otherwise agreed by the parties.
5. Pricing schedule is subject to change if SOW is not signed within 30 days of creation date at which time this SOW will expire.

11. PRICING SCHEDULE

The estimated costs of the current SOW are presented below.

MRI SERVICES				
DESCRIPTION	QUANTITY	UNIT	RATE	EST. SERVICE FEES
Solution Consultant	1	Fixed Fee	\$750	\$750
MRI SERVICES TOTAL				\$750

12. AGREEMENT TO COMMENCE WORK:

With my signature below and on behalf of Client, Client hereby (i) agrees that this document gives a true and accurate representation of the work agreed upon by Client and MRI, (ii) approves this SOW as issued, (iii) authorize MRI to undertake the work specified above and agree to the Terms and Conditions as specified above, and (iv) acknowledge that these terms are subject to change in accordance with any modification to the scope of work. I confirm that I am an authorized representative for Client.

COUNTY OF LAKE-LAKE COUNTY HOUSING COMMISSION

* Signature: Jessica Pyska
Jessica Pyska (Nov 29, 2023 13:59 PST)

* Name: Jessica Pyska

* Date: 11/29/2023

* Indicates required field

ATTEST: SUSAN PARKER
Clerk to the Board of Supervisors

By: Johanna DeLong

APPROVED AS TO FORM:
County Counsel

By: _____





Certificate of Completion

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Signatures/Initials

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