



## Salesforce.com Professional Services For



November 15, 2024

### Ventas Consulting, LLC

5 Cowboys Way, Suite 300  
Frisco, TX 75034

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## Statement of Work Provisions

This STATEMENT OF WORK shall be executed pursuant to the Services Agreement (the "Agreement") among Ventas Consulting, LLC and CareerSource Central Florida (hereinafter "CLIENT"). Terms used herein and not otherwise defined shall have the meanings as defined in the Agreement.

**Scope of Work** Ventas Consulting, LLC proposes to make the services contained in this Statement of Work (the "Services") available to CLIENT

**Start Date:** ASAP

**Termination:** Either party may terminate the Statement of Work for convenience at any time by providing a 60 day written notice to the other party. In the event this Statement of Work is terminated by CLIENT due to no fault of Ventas Consulting, any amounts pre-paid to Ventas Consulting shall not be refundable and CLIENT shall pay the hourly rate of Ventas Consulting for hours of work up to date of termination plus any additional expenses incurred in performance of the Services. If Ventas Consulting terminates this Statement of Work due to no fault of CLIENT, then Ventas Consulting shall refund any pre-paid amounts for which Services have not yet been provided.

## Primary Contacts

**Ventas Consulting, LLC  
Key Contact**

Below are your primary contact(s) from Ventas Consulting related to the proposal contained herein

Richard Gonzales, President  
(214)491-8246  
[richard@ventasconsulting.com](mailto:richard@ventasconsulting.com)

**CSCF  
Key Contact**

Below is the primary contact for CLIENT

Director of IT Paul Worrell  
[pworrell@careersourcecef.com](mailto:pworrell@careersourcecef.com)  
(407) 531-1222

Office 390 N. Orange Ave.  
Suite 700  
Orlando, FL 32801  
[www.careersourcecentralflorida.com](http://www.careersourcecentralflorida.com)

The Youth Universal Platform aims to streamline the interactions between youth, families, staff, business partners, and training partners by facilitating online applications, case management, document tracking, compliance, and payment processing. The system will provide real-time updates, case management tools, financial functionalities, and communication between all stakeholders.

<b><u>Activities/Deliverables</u></b>	<b><u>Time</u></b>
<b>Project Management</b> <ul style="list-style-type: none"> <li>● Manage the project plan, deliverables, and timeline</li> <li>● Schedule working sessions (discovery, design, testing, etc.)</li> <li>● Capture/resolve any risks, issues, or dependencies</li> <li>● Create/deliver weekly project status reports</li> </ul>	<b>76 hours</b>
<b>Architectural Oversight</b> <ul style="list-style-type: none"> <li>● Provide technical and architectural direction on all work streams</li> <li>● Provide quality assessments on all Salesforce deliverables</li> <li>● Capture/resolve technical risks, issues, or dependencies</li> </ul>	<b>12 hours</b>
<b>Discovery and Design</b> <ul style="list-style-type: none"> <li>● Conduct requirement gathering (working) sessions <ul style="list-style-type: none"> <li>○ Stakeholder discovery</li> <li>○ Process discovery and documentation</li> <li>○ Technology discovery</li> <li>○ Object/Data architecture discovery</li> <li>○ Security and Governance discovery</li> <li>○ Analytics discovery</li> </ul> </li> <li>● Conduct Gap analysis between SOW and final requirements</li> <li>● Creation of Solution Design Document</li> <li>● Review / Revise Solution Design Document</li> <li>● <i>Note: Discovery and Design could be reduced with formal requirements gathering by CSCF. Upon receipt of those documented requirements we can re-estimate the required time.</i></li> </ul>	<b>144 hours</b>
<b>Configuration/Development – Youth/Families</b> <ul style="list-style-type: none"> <li>● Up to 8 hours for the creation of objects and fields not included in Non-Profit Cloud (NP Cloud) by default to track pertinent data points, demographics, application specifics, etc.</li> <li>● Security Configuration <ul style="list-style-type: none"> <li>○ Up to 8 hours to define user roles, groups, permissions, sharing, and object and field level security</li> </ul> </li> <li>● Creation of up to 4 OmniScript online applications <ul style="list-style-type: none"> <li>○ Assumes solution will leverage OmniStudio functionality included with NP Cloud</li> <li>○ Estimate can be reduced with lower number of applications</li> </ul> </li> <li>● Document upload tracking functionality</li> </ul>	<b>332 hours</b> 8 hours 8 hours 192 hours 4 hours

- Assumes upload tracking will not include automated logic for selecting the required documents but rather identifying them directly on each form.
- Application Tracking Enhancements/Workflow Automation 24 hours
  - Up to 24 hours to extend basic out of the box application tracking to perform workflow or notification functionalities, automations, and validations specific to CSCF
  - Reduced time includes basic automations with time removed for document verification
- Creation of online portal for Youth/Family access to apply, submit supporting documentation, open cases, and register for CSCF programs 56 hours
  - Assumes no migration of youth users from existing system
  - Assumes youth can self-register and that complex user provisioning is not required
  - Assumes no complexity around the nature of database relationships between youth and families (for example ways to relate youth to previously captured families and to validate those affiliations for security and to prevent data duplication)
  - Assumes creation and configuration of a single portal with no custom development
- Creation of simple program registration functionality 40 hours
  - Assumes functionality will not require advanced scheduling capabilities around dates, times, instructor expertise, etc. but will be implemented as an event driven solution with attendee limits and workflows to account for approval processes, drops, etc.
  - Assumes no custom development is required

**Configuration/Development – Case Managers, Admins, etc. 96 hours**

- Case Management Configuration 40 hours
  - Up to 40 hours to define case types, escalation behavior, routing and assignment, case intake functions such as email to case, page layouts, and validation rules
- Up to 4 hours of additional enhancement to objects and fields to support internal application processing and tracking 4 hours
  - Assumes solution will leverage standard NP Cloud objects, fields, and features with limited enhancement to support CSCF internal processes
- Security Configuration 6 hours
  - Up to 6 hours to define user roles, groups, permissions, sharing, and object and field level security
- Task Management Configuration and Enhancement 8 hours
  - Assumes solution will leverage standard Task features with limited enhancement and automations to streamline CSCF case manager workflows but that will not require custom development
- Case Manager/Admin Workflow and Automation Configuration 32 hours
  - Up to 32 hours of workflow/automation configuration based on available information

- Assumes document approval automations are simple in nature (for example no automated document analysis, optical character recognition, AI features, etc.)
- Assumes site visit scheduling is simple in nature and not a fully featured calendaring solution requiring inspector expertise, driver routing, etc. and is more event based; a more fully featured scheduling solution would require further scope and/or additional licensing costs
- Assumes compliance check automations are simple in nature such as periodic visits/reviews based on approval dates
- Assumes standard Salesforce Files will meet document management requirements; if they do not additional scope will be required
- Salesforce Chatter configuration with up to 5 Chatter Groups 6 hours
  - Assumes basic Chatter implementation without requirements for post prevention or word blocking

**Configuration/Development – Business Partners 128 hours**

- Extension of online portal to support tracking of youth internship progress and job placement, submissions of reports, and invoicing of deliverables 40 hours
  - Assumes that primarily object and field configurations along with previously listed deliverables will meet requirements
  - Assumes no custom development is required
- Up to 8 hours for the creation of objects and fields specific to the business partner application process and partner data, internship placement, and invoices 8 hours
- Security Configuration 8 hours
  - Up to 8 hours to define user roles, groups, permissions, sharing, and object and field level security
  - Assumes business partners will only be able to access the records they create in the application and that no complex sharing or surfacing of youth data is required
- Creation of up to 1 OmniScript online applications to support business partner program application 48 hours
  - Assumes the business partner application process shares some similarities with the youth application process
  - Assumes no more than 1 business partner application processes are required
- Business Partner Workflow and Automation Configuration 24 hours
  - Up to 24 hours of workflow/automation configuration based on available information
  - Assumes workflow automations are simple in nature and can be determined using data points captured in out of the box fields without the need for custom development

**Configuration/Development – Training Partners 156 hours**

- Extension of online portal to support program management, attendance, and deliverables 40 hours

- Assumes that primarily object and field configurations along with previously listed deliverables will meet requirements
- Assumes no custom development is required
- Up to 8 hours for the creation of objects and fields specific to training partners including sessions, attendance, and deliverables 8 hours
- Security Configuration 4 hours
  - Up to 4 hours to define user roles, groups, permissions, sharing, and object and field level security
  - Assumes training partners will only be able to access the records they create in the application and that no complex sharing or surfacing of youth data is required
- Creation of program management functionality 32 hours
  - Assumes that program management is session based as opposed to an advanced calendaring solution requiring instructor expertise etc.
- Creation of rating and survey functionality 40 hours
  - Assumes a solution that can be configured or developed in 40 hours will meet requirements
  - Assumes ratings and surveys can be delivered/submitted directly to/from youth through their portal account
- Training Partner Workflow and Automation Configuration 24 hours
  - Up to 24 hours of workflow/automation configuration based on available information
  - Assumes workflow automations are simple in nature and can be determined using data points captured in out of the box fields without the need for custom development

**Configuration/Development – Financial/Compliance Teams 68 hours**

- Up to 8 hours for the creation of objects and fields specific to training partners including sessions, attendance, and deliverables 8 hours
- Security Configuration 4 hours
  - Up to 4 hours to define user roles, groups, permissions, sharing, and object and field level security
- Creation of Payment Processing functionality 32 hours
  - Up to 32 hours to configure the Sage Intacct Salesforce connector
  - Assumes that integration with Sage Intacct will meet all payment processing requirements and that custom integrations for each bank are not required (is this accurate?)
  - Assumes that the Sage Intacct Salesforce Connector will be acquired at an additional cost (reduced for CSCF as a non-profit) to reduce overall level of effort and custom development; a custom solution will increase scope
  - Assumes that imports can be leveraged as a backup plan
  - Assumes that Sage Intacct Connector can support the use cases defined in the requirements
- Finance/Compliance Workflow and Automation Configuration 24 hours
  - Up to 24 hours of workflow/automation configuration based on available information

- Assumes workflow automations are simple in nature and can be determined using data points captured in out of the box fields without the need for custom development

**Data Migration** **4 hours**

- Assumes some data migration of Training Partners only

**Reporting** **8 hours**

- Assumes that CSCF internal analytics teams can self-learn reporting and analytics capabilities of Salesforce or consume exports of Salesforce data that can be generated by CSCF team members with guidance of Ventas staff

**Testing** **80 hours**

- Creation of Scenario Based Test Scripts 8 hours
  - *According to user stories, documented in discovery phase*
  - Assumes Ventas can assist CSCF team members in generating most test cases
- Unit Testing 16 hours
- System Integration Testing 16 hours
  - Assumes Sage Intacct is the only integrated external application
- User Acceptance Testing 40 hours
  - Up to 40 hours of client support for UAT
  - Includes defect remediation

**Deployment** **16 hours**

- Creation of deployment plan 4 hours
- Includes Sandbox and Production deployments 12 hours

**Training and Documentation** **40 hours**

- System configuration and enhancement documentation 32 hours
- Development/Presentation of Training Sessions 8 hours
  - Assumes training will be one or more Train-the-Trainer sessions (up to 8 hours) with CSCF staff producing user guides

**Post Project Support** **40 hours**

- Up to 40 hours of Post Go-Live Production Support (Hypercare)

**Total: 1192 hours**

## **Additional Assumptions**

This Statement of Work specification is based on the following additional assumptions:

- Project Timeline is assumed to be 19 weeks. Any delays due to missed client deliverables could cause the project to miss the November target.
- Project management time is based on a 19-week timeline. Any project delay beyond the 18-week duration will require additional scope.
- Sign off of all migration efforts/development will be needed in order to proceed to the deployment phase.
- Ventas assumes there will be ready access to stakeholder/decision makers for the entirety of the project, in order to be successful.
- Ventas assumes that all users of functionality within the scope of this engagement will have the appropriate licenses in Salesforce to support the requirements and that the licenses will be available prior to the project start date.
- Ventas has estimated this effort to the best of our ability, based on the provided information. If additional complexity is discovered, further scope will be required.
- Assumes that this effort is above MVP but expects to have a second phase to further automate, expand, and refine functionality.
- All required third-party APIs (banking, document verification) will provide the necessary documentation and access.



## Fee Schedule

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**Services Fee** As compensation for the services contained in this document, Ventas Consulting proposes the following fee structure below:

**Support services will be invoiced on the 1<sup>st</sup> day of each month and services fees during term of contract will not exceed annual budget of \$225,000**

- **Services Fee is payable as follows with payment terms due upon receipt of invoice(s)**
  - **Monthly Support Hours worked will be billed on the 1<sup>ST</sup> of each month and invoices payable upon Net 30 Terms**

The Services Fee is based on the responsibilities outlined in this document. Should CLIENT change the requirements which cause re-work, or request hours of effort in excess of those provided under contract, such hours will be invoiced additionally at the rate of \$145/hour.

The pricing and terms contained in this Statement of Work shall expire (15) days from the date on the cover hereof, if not extended by Ventas Consulting in writing or accepted by CLIENT prior to such date.

By signing below, CLIENT accepts the terms of this contract.

Accepted by:

**Ventas Consulting, LLC**

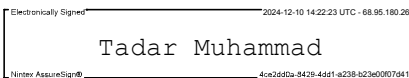
By: 

Title: President

Date: 12/11/2024

Accepted by:

**CareerSource Central Florida**

By:  Tadar Muhammad

Title: Chief Operating Officer

Date: 12/10/2024

**Please return all pages of this Statement of Work via one of the following:**

**By FAX to: 866.479.8373**

**By E-MAIL to: [richard@ventasconsulting.com](mailto:richard@ventasconsulting.com)**

**By MAIL to: Ventas Consulting, LLC  
5 Cowboys Way, Suite 300  
Frisco, Texas 75034**