INTERFOLIO PROFESSIONAL SERVICES - STATEMENT OF WORK

This Work Statement is a preliminary expectation of both Interfolio and Customer ("Customer") of the services that shall be performed. This SOW is an exhibit to the Order Form between Interfolio and Customer which is hereby referenced and incorporated into this SOW and will control the delivery of services. It may be modified by a writing approved by the designated representatives of each Interfolio and Customer. Any services beyond the scope outlined herein, shall be the subject of an additional SOW.

Objective

We are proud to propose to Customer an Interfolio Professional Services effort to support the implementation of Review, Promotion, and Tenure.

The intended outcomes of this effort are to:
- Ensure successful implementation of the selected product.
- Provide knowledge transfer and train Customer project team as the key administrative users who will be critical to the successful implementation of the solution.
- Deploy the Interfolio solution and ensure the successful rollout for the Customer organization.

Professional Services Overview

The Interfolio Professional Services team provides expertise and guidance throughout the implementation process. These services vary in scope and effort based on our review of the Customer requirements. The team is planning to deliver Implementation services, based on the objectives stated above.

Below you will find a description of the proposed effort to ensure a successful deployment of the Interfolio solution.

Activities and Deliverables

The Interfolio Project Manager and his or her team (Scholar Services, Functional Consultant, etc.) will lead and train the Customer in a series of activities as shown below. The Customer will assign the appropriate resources to support this effort (aka "core team," ideally 2-3 members) that will include a Project Manager, executive sponsor and other stakeholders where appropriate. The Customer core team will work closely with the Interfolio team to successfully deploy the solution using the Interfolio project methodology.

The order of tasks may vary slightly but generally the activities critical to the success of the effort are organized into a phased methodology approach as follows:

Implementation Services
Review, Promotion, Tenure

1. ***Plan*** - *The Interfolio Project Manager will schedule the kickoff discussion with the Customer Project Manager and his/her defined team. During this meeting, the team will define the key objectives of the deployment and develop the overarching project plan with the timeline and schedule. They will also define the communications tools (i.e., Customer dashboard) and meeting cadences to ensure that the team is meeting regularly to discuss progress, timeline and potential risks around the implementation*

2. ***Inform*** – *The Interfolio Project Manager will begin this phase by demonstrating the functionality and then training the Customer Project Manager/administrator in order to fully understand the functional areas of the solution. They will work together to define and configure the various system inputs including: institution hierarchy, custom forms, user roles and permissions and the overarching template workflows. We will also ensure that the functionality for administrators, committee managers and committee members is well defined and understood by the Customer project team. The Interfolio Project Manager will also ensure there is a clear understanding by the project team regarding the reporting functionality of the module. At this point in the implementation, the Customer will have a solid understanding of the solution and will review and test the workflows in order to move into the next phase.*

3. ***Train*** – *The project team will schedule the training sessions to be delivered to the Project Manager, system administrators and committee managers. This training will be delivered as agreed upon between Customer and Interfolio. The Interfolio Project Manager will work with the Customer Project Manager to ensure that schedules align and that the necessary technology is in place to support the training sessions.*

4. ***Deploy*** – *Upon completion of the training the solution is ready to be deployed to the end users and the searching efforts will commence based on the Institutions timeline. The Interfolio Project Manager will also perform a debrief on the implementation and close out the project plan. All day to day support will now be transferred to Interfolio's Scholar Services Team.*

Annual Project Management Service

This service, if purchased, is an additional service that is applicable in year two and each year beyond the first-year license period. It ensures a premium level of project management and overall support to your Institution governance team and ensure smooth operations. The service provides the following:

1. ***Project Management*** - *Direct access to your Interfolio Project Manager for the full term of your license in order to provide seamless service and 2nd level advisory support. This includes one onsite annual retraining for new institutional users as well as continuing support of the current configuration with additional units and set up as applicable. Support will also be provided for configuring existing integration services and management of recurring data transfers and/or product integrations.*

2. ***Quarterly Utilization Reports*** – *The Interfolio Project Manager will schedule and deliver a report at the end of each quarter highlighting usage, activity and overall utilization. The Project Manager will also address any anomalies in the reports and perform process reviews and updates when applicable.*

3. ***Product Release Management*** – *This activity will include more in-depth communication and training around new features and product updates occuring during the term of the license. The Interfolio Project Manager will ensure all communications are being reviewed, analyzed and acknowledged by the Customer team.*

4. ***Advisory Support and Faculty Adoption Consultation*** – *Should Customer require additional training and consultation to help with adoption, the Interfolio Project Manager can support this effort. The Project Manager will provide materials and online resources, and hold regular sessions for training, consultation and support.*

5. ***Integration Consultations and Ongoing Support*** – *As the usage of the product continues to grow, so does the need to review and consider additional data sources outside the scope of an initial implementation. As part of this service, the Interfolio Project Manager can work with the Customer to review those sources, analyze relevant touch points and discern whether additional automatic data loads can be utilized in the system. The Interfolio Project Manager will lead these discussions and help the Customer team to decide whether additional integrations are necessary.*

Interfolio Implementation and Support Team

Implementation begins by identifying the members of our staff who will serve as your primary contacts for the project. These primary roles are as follows:

1. **Project Manager:** As the primary point of contact for your core team, the Interfolio Project Manager is responsible for the planning and implementation of Interfolio's products. Serving as an expert in Interfolio's products, functionality, and applications, the Project Manager will work closely with your core team to construct a project plan, schedule alignment meetings and trainings, and coordinate with all relevant parties through project closeout.

2. **Scholar Services Support:** Interfolio's Scholar Services team will act as the primary contact for product and technical support for your institution's administrators, faculty, and staff. In addition to curating an online Help Center, our Scholar Services team are available for live support via phone and email from 9:00am – 6:00pm Eastern Time, Monday through Friday.

Customer Responsibilities

To support initial implementation and ongoing support of Interfolio, the Customer also agrees to provide a day-to-day point of contact throughout the life of the project. This person can either be a system administrator or Project Manager who is ultimately responsible for the success of the effort. This resource will act as the team lead on the Customer core team. His or her responsibilities include:

1. Attend project team meetings and training sessions designed to prepare the core team to perform and manage all administrative processes

2. Providing access to resources and executives as necessary for this project

3. Following-up on questions and circulating materials as appropriate

4. Facilitating scheduling, inviting and confirming participants for online presentations and working sessions if appropriate

5. Ensuring access to data sources and any other relevant inputs to the process

6. Coordinate with sub-level unit administrators in performing modifications to system configuration

Customer also agrees to include executive-level leadership and support for the project. This typically consists of representation from any combination of: the office of the Provost, faculty, Information Technology, Institutional Research, and/or Faculty Affairs. Duties of the core team include:

1. Primary stakeholders for the project and validate the direction and ongoing uses for how Interfolio will be used at the institution

2. Participation in quarterly checkpoints or regularly scheduled discussions during year one of the implementation

3. Determine key roles & responsibilities for the deployment including management of digital records, technical system support, or data integration with other campus systems

Closeout Process

As part of our methodology, the Interfolio Project Manager will consolidate relevant information and will formally close out the project once the above tasks and activities are completed. This will include incorporating feedback, identifying key insights and scheduling a debrief session with the Customer team and executive sponsors to review these findings.

Change Management

Once the Customer has agreed upon the actitivites included in this proposal along with a project schedule with the list of deliverables (in the Plan phase), then the combined project team (Interfolio and Customer) will utilize change control if a change occurs that would impact the agreed upon delivery. Any request for any change in service must be in writing: this includes requests for changes in project plans, scope, schedule, requirements and design specifications, or any other aspects of the project. Services related to changes will be performed only after the Customer and Interfolio agree in writing to the proposed changes.

Fees
The proposed services are priced as indicated in the Order Form.