



251 North City Drive  
Suite 128F #113  
San Marcos, CA 92078

**SOW # 20250505**

**Perform OnePlan FastTrack Services for Canyon County, ID**

**Date:**

**May 7, 2025**

**Services**

**Performed For:**

**Canyon County, ID**

1115 Albany St,  
Caldwell, ID 83605

Statement of Work

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Statement of Work # 20250505 (hereinafter called the "SOW"), effective as of May 7, 2025, is entered by and between OnePlan Solutions, LLC ("Contractor") and Canyon County, ID ("Client") and is subject to the terms and conditions specified below. The Exhibits(s) to this SOW, if any, shall be deemed to be a part hereof. In the event of any inconsistencies between the terms of the body of this SOW and the terms of the Exhibit(s) hereto, the terms of the body of this SOW shall prevail.

25-06A



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## About Our Company

### Our Story

OnePlan Solutions (Contractor) is a trusted global provider of digital transformation services and solutions, with expertise in portfolios of products, services, and projects. In 2019, 2020, 2021, 2022 and 2023 our team was awarded the **Global Microsoft Project and Portfolio Management Partner of the Year award** and finalist demonstrating breakthrough customer impact and solution innovation. We have numerous Microsoft credentials, as well as key certifications in the Scaled Agile Framework.

Business leaders face challenges to gain insights across their portfolios and align objectives, strategy, and investments. We provide customers with the business agility needed to succeed in the modern economy: visibility, flexibility, and speed. For many years, our team has been the world leader in helping enterprises manage their portfolios of products, services, and projects. Thanks to seed investment from Microsoft, our team and our business has grown from strength to strength. Once a pair of American and Canadian business units in the multi-faceted services company named Wicresoft, we later, we spun off from Wicresoft to become a unique company, focused on serving the markets of USA, Canada, Europe, and Australia. Our OnePlan technology platform has always been a successful brand; the OnePlan name now encompasses the technology, consulting, and support services that our team delivers.

### Our Purpose

Our software and services help our customers operate with business agility: productivity, speed to market, quality, and employee engagement. Our partnership is with Microsoft, with whom we continuously align on a bright vision for the future of work.



## About the OnePlan Software Solution

OnePlan is a powerful online solution for Project Portfolio Management (PPM) and everyday work. Delivered through Office 365, OnePlan enables organizations to get started, prioritize project portfolio investments, and deliver the intended business value—from virtually anywhere on nearly any device.

The key to delivering project value is building highly productive teams that can find the information they need instantly to do their work and achieve their business goals. Today, project teams must be able to collaborate virtually anywhere, via any means, to keep the conversation active and the projects progressing. Connecting people empowers productivity, increases knowledge, and builds confidence; confident teams outperform disconnected project teams every time.

Every Feature you need to manage your projects online.

### Forecast, Plan and Manage Demand

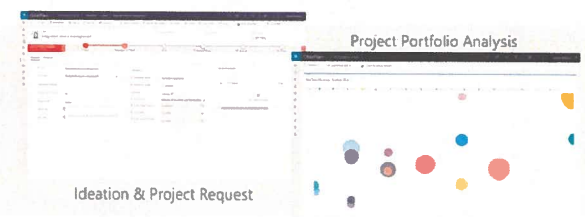
Demand can come from anywhere. Strategic projects, operational activities and IT initiatives are just a few that could impact the work already in motion.



### Gain Control of your Resources

Managing your resources effectively is the number one way to reduce costs across the organization. Your people are your most valuable asset, but they are also your biggest expense. Know exactly what your resources are working on regardless of whether it is project, operational or service related.

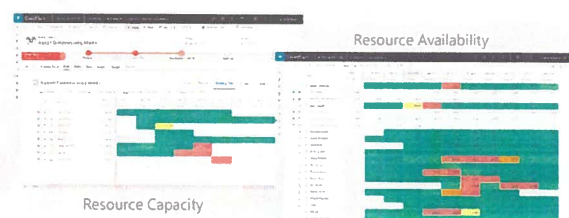
### Demand Management



### Align and Strengthen Your Portfolio

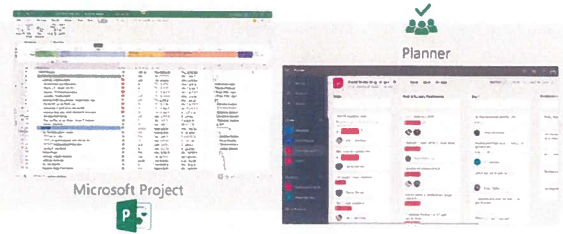
Due to the ongoing shifts in the economy, discretionary spending has been reduced and the constant need to justify business decisions has forced business leaders to tighten controls. The perfect combination of value optimization and resource utilization has become essential for project success.

### Resource Management



# OnePlan

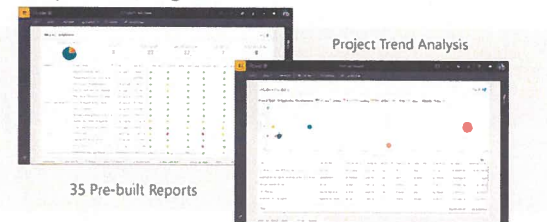
## Project Management



### Stay On Top of Issues and Risks

Being able to predict and prevent potential project issues will help you make better decisions across the board and is a critical component of project management best practices. Should risks occur within your projects, mitigation can mean the difference between project failure and success.

## Analytics & Integrations



### Improve Everyday Collaboration

Work seamlessly with others to effectively track status and manage changes.

Quickly deliver project information to your team and easily receive their changes from virtually anywhere with improved task list synchronization between Project and Microsoft Teams.

Kick off real-time conversations right from your project with Project's new integration with Microsoft Teams.

## Time Tracking

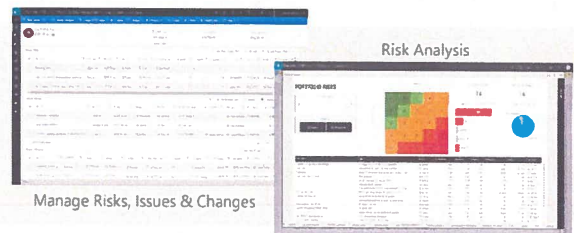


## Statement of Work

### Schedule on your Terms

Not everyone is a seasoned project manager but most everyone has projects to manage. Without a blueprint of where you are going, it can make it impossible to execute on projects with accuracy and efficiency. Regardless of if you are a professional or occasional project manager, OnePlan has the right tools to help you manage your work.

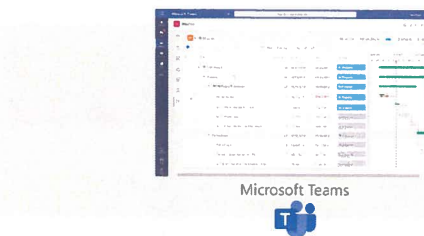
## Risk, Issue & Change Management



### Gain Insights Through Reporting and BI

Without key insights into projects, work, and resources, the ability to make the right decisions is nearly impossible. One of the biggest challenges for many organizations is the ability to understand, organize, and display the data that is being captured. Proactive work performance and productivity begins with the outputs.

## Collaboration



### Track Time on Investments

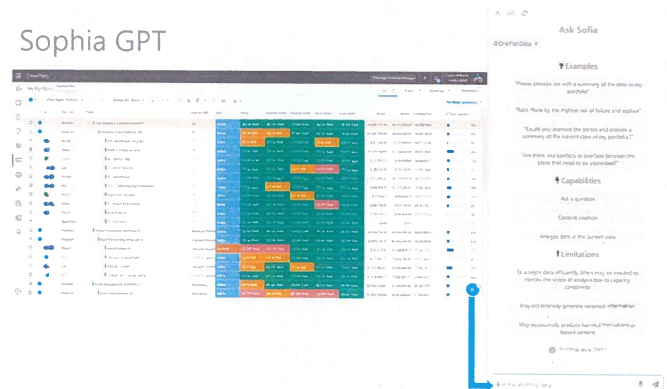
Unleash data-driven insights, increase productivity, and bring overall awareness to what your teams are working on through OnePlan's time tracking capabilities. Time Tracking Automation provides efficiencies, optimized profitability, and peak performance.



## OnePlan AI – Sofia GPT

Sofia GPT is an advanced Azure OpenAI GPT module developed by OnePlan to revolutionize the way individuals and businesses manage their strategic portfolios, resources, investments and work. Powered by state-of-the-art AI algorithms, Sofia GPT is capable of understanding natural language and responding in real-time, making it an invaluable asset for anyone looking to streamline their strategic planning and decision-making processes.

## Sophia GPT





## Project Scope

The following represents the services and outcomes associated with the project.

Contractor is quoting a special offering specifically designed to fit within budgetary needs of organizations that do not have complex requirements, or large numbers of users. Client has taken or will take the lead in configuring OnePlan to meet its requirements and will use OnePlan Advantage services for guidance and assistance as needed. Consequently, scope and expectations for configuration are generally limited to basic OnePlan configuration efforts, and OneConnect connectors for integrations that use standard, supported use cases.

Contractor will assist and guide Client through a best practice review, configuration, and modification of OnePlan. This SOW will provide for time and materials services that will address the following:

- Technical Readiness services
- Review the existing OnePlan configuration
- Get Client requirements on desired enhancements and improvements
- Configure OnePlan to meet requirements
- Training OnePlan users and administrators

## Deliverables

The following list represents the services and deliverables for the Client's adoption of the OnePlan solution:

- **Additional Configuration Services:** Provide up to 40 hours of technical and consulting support to include:
  - Requirements verification
  - Configuration
  - Power BI report reviews and modifications

## Training – OnePlan Academy

OnePlan Academy is a comprehensive training and adoption services platform. The service is built to help OnePlan customers achieve their desired outcomes by having access to learning resources that suit their individual needs. From instructor-led, role-based courses to on-demand digital content, you will always have access to the resources you need to be successful with OnePlan. OnePlan Academy has several packages that you can select from. The service is built with flexibility in mind, and customers can elect to switch subscriptions as their needs evolve.

The **Express** package has been quoted in this SOW.



	Standard Course Content (LMS)	Instructor-Led Classes	Customized Site Logo and Theme	Customized Learning Paths	Customized Course Content	Annual Subscription Fee	Set-up Fee (one-time)
Standard	✓	-	-	-	-	Included with Premier Success	-
Express	✓	2		-	-	\$3,000	-
Professional	✓	3	✓	✓	-	\$6,000	-
Enterprise	✓	4	✓	✓	✓	\$12,000	Contact Sales

Standard	
<p>The Standard learning package is designed to deliver standard content that is always available via our digital Learning Management System. With role-based, feature-based, and self-paced learning tracks, all users will have access to resources they need to gain knowledge of standard OnePlan features and capabilities.</p>	<ul style="list-style-type: none"> <li>• Access to standard LMS training content.</li> <li>• Role-based learning paths.</li> <li>• Feature-based learning modules.</li> <li>• No ability to modify the interface, look and feel or content of the site.</li> </ul>
Express	
<p>If you prefer to have your OnePlan learning management system to have the same look and feel as your other corporate digital resources, this is the package for you. The Express offering builds on the Standard package and adds access to instructor-led, long-form training content delivered via live sessions or on-demand.</p>	<ul style="list-style-type: none"> <li>• Includes all features of the Standard package.</li> <li>• Up to two classes annually of instructor-led training selected from the OnePlan training catalog. Training will be delivered via dedicated sessions or webinar.</li> </ul>
Professional	
<p>For customers wanting more flexibility with the learning management system, the Professional package allows you to tailor your learning management system to have the same look and feel as your other corporate digital resources. Additionally, you can design learning paths tailored to your specific roles and scope of using the system. We leverage the same high quality standard content and present it in a way that matches your specific use case, so individual users are presented with the most relevant content, and in the right sequence, as they go through their OnePlan learning journey.</p>	<ul style="list-style-type: none"> <li>• Includes all features of the Express package.</li> <li>• Up to three classes annually of instructor-led training selected from the OnePlan training catalog. Training will be delivered via dedicated sessions or webinar.</li> <li>• Ability to modify learning paths based on specific roles (e.g.: combine plan manager and resource manager learning paths into a single track).</li> <li>• Ability to reorder learning path content, and hide training content that is not relevant to your use case.</li> </ul>
Enterprise	
<p>This offer is for customers who prefer maximum flexibility when it comes to designing their learning management system. Our digital learning management platform allows for full flexibility when it comes to both content and interface, and the</p>	<ul style="list-style-type: none"> <li>• Includes all features of the Professional package.</li> <li>• Up to four classes annually of instructor-led training selected from the OnePlan training catalog. Training will be delivered via dedicated sessions or webinar.</li> </ul>



Enterprise package will enable you to design a system that specifically matches your requirements.

- Full flexibility in modifying the user interface.
- Full flexibility in modifying and/or developing custom training content that is specific to your configuration and OnePlan use case.

### Additional Training Options

An active training package subscription is required for accessing instructor-led training courses. Customers interested in additional training courses, can choose from a variety of available training courses.

### Instructor-Led Courses

For eligible OnePlan Academy subscriptions, there is a selection of instructor-led courses available. You can find a full catalog of courses at <https://oneplanacademy.com/course-catalog/>

### Scoping Assumptions

1. This engagement supports one Production+UAT+DEV OnePlan instance. Maintenance, configuration, or support of any additional instances are not included within the scope of this project.
2. This engagement supports one Production+UAT+DEV Release of OnePlan. Support of any additional releases are not included within the scope of this project
3. OneConnect out-of-box integrations are supported. OneConnect customization is not included within the scope of this project.
4. OnePlan has restricted fields that cannot be modified due to constraints based on the pre-configuration and the OnePlan reporting solution. Modifying any restricted field is out of scope and will not be supported.
5. Quality Assurance. Quality Assurance work will be required during the project. It is assumed that quality assurance work can be provided within the budget of hours established for 'Technical Consultant' and 'Solution Consultant'. It is also recommended that Client provides support to QA activity.

### Out of Scope

1. Any integrations / interfaces to external line of business systems not identified in solution scope.
2. Modification or re-formatting of SharePoint forms.
3. Product customization (code development)
4. Business process design/re-engineering. This service package assumes that Client already has satisfactory processes in place.



5. Advanced reporting not identified in the solution scope.
6. Data migration of existing customer data.
7. Advanced workflows not identified in solution scope.
8. Printing and shipping of training materials. Electronic (PDF) versions of training materials will be provided to Client. Contractor will provide the training documents / electronic files at least 5 days prior to delivering a class.
9. No Migration from an existing system to OnePlan

## Post-Launch Adoption

### Product Success

We have quoted Premier Product Success in this SOW for the added value it will provide to best ensure Client adoption and success. Customers particularly see value in access to the Learning Management System, and the subscriptions for Dev/Test instances of OnePlan.

Premier Product Success	
Learning Management System (LMS)	✓
Support Resourcing	Personalized technical support from a designated engineer(s) who is an expert in your OnePlan instance
Web based / Email Service Requests	✓
Phone / Virtual Meeting Support	✓
Critical ticket service level objective (SLO)	Ongoing response SLOs (English only) of 2 hours for Urgent requests
Periodic Health Check	✓
Executive Business Review	✓
10% Discount on Online Training Courses and Boot Camps	✓
Dev/Test Environment Licensing	✓
Early preview to upcoming releases	✓
Invitation to participate Customer Advisory Board	✓
	<b>20% licensing fee</b>



## Investment

Pricing for the products and services contained in this SOW include the following. Using an Agile approach, the configuration scope will be limited to a backlog of user stories that can be accomplished in the hours quoted below.

One-Time Fees					
Deliverables	Qty	Units	Rate	Total	
<b>Fixed Price Programs</b>				\$	-
Proof of Concept Consulting (40 hours effort, 30 day duration)	0	1	\$ 9,400	\$	-
Pilot Consulting (80 hours effort, 60 day duration)	0	1	\$ 18,800	\$	-
Business Strategy Workshop	0	1	\$ 10,000	\$	-
<b>T&amp;M Consulting Services</b>				\$	<b>9,400</b>
KickStart Technical and Configuration Services	0	120	\$ 235	\$	-
PoC or Pilot Services	0	120	\$ 235	\$	-
Additional Configuration Services	1	40	\$ 235	\$	<b>9,400</b>
Custom Report Development	0	40	\$ 235	\$	-
OneConnect Setup/Configuration - Azure DevOps	0	40	\$ 235	\$	-
OneConnect Setup/Configuration - JIRA	0	40	\$ 235	\$	-
Adoption and Change Management	0	40	\$ 235	\$	-
				<i>One Time Fees Sub Total</i>	\$ 9,400
				<b>Services/ One-Times Fees Total</b>	<b>\$ 9,400</b>



Recurring Annual Subscription Fees			
Deliverables	Qty	Price	Total
<b>OnePlan</b>			<b>\$ 10,020</b>
OnePlan - Enterprise	9	\$ 600	\$ 5,400
OnePlan - Team Member Plus	27	\$ 60	\$ 1,620
OnePlan - Innovation Portal (Enterprise - more than 500 users)	0	\$ 6,000	\$ -
OnePlan - Innovation Portal (SMB - less than 500 users)	1	\$ 3,000	\$ 3,000
<b>Training and Post-Launch Services</b>			<b>\$ 5,004</b>
<b>OnePlan Advantage - Annual Subscription Options</b>			
Essentials (40 hours) (FastTrack)	0	\$ 8,000	\$ -
Plus (100 hours)	0	\$ 18,000	\$ -
Core (200 hours)	0	\$ 30,000	\$ -
Enterprise (450 Hours)	0	\$ 64,000	\$ -
<b>OnePlan Academy - Annual Subscription Options</b>			
Express - Standard LMS, 2 instructor-led courses	1	\$ 3,000	\$ 3,000
Professional - Custom LMS, 3 instructor-led courses	0	\$ 6,000	\$ -
Enterprise - Custom Content, 4 instructor-led courses (*Setup fee)	0	\$ 12,000	\$ -
<b>Product Success</b>			
Premier Product Success (20% of software subscription fees)	1	\$ 2,004	\$ 2,004
<i>Subscription Sub Total</i>			\$ 15,024
<i>Subscription Volume Discount</i>			\$ -
<b>Subscription Total 3-year agreement/ annual payments</b>			<b>\$ 45,072</b>
<i>Government Discount 10%</i>			<i>\$ (4,507)</i>
<i>3-year Agreement Discount 20%</i>			<i>\$ (9,014)</i>
<b>Sub Total Subscriptions</b>			<b>\$ 31,550</b>
<i>Total Discounts and Promotions</i>			<i>\$ (13,522)</i>
<b>Grand Total (Services and Subscriptions)</b>			<b>\$ 40,950</b>
<b>Currency of Quotation: <b>USD</b></b>			

This engagement will be conducted on a Time and Material (T&M) basis. Time will be invoiced in 30-minute increments based on actual time spent on Consulting Services. The total value for the Services pursuant to this SOW is **\$9,400** unless otherwise agreed to by both parties via the project change control procedure, as outlined within. A project change request (PCR) will be issued specifying the amended value and must be authorized, in writing, by Client. Consulting services will be invoiced at the end of each month as the services are performed. If any Consulting Services hours remain unused after three years from the date of execution, Client will not be responsible for payment of the unused hours.

Products and subscriptions in total of **\$31,550** will be invoiced up front per the schedule below after receipt of the signed SOW or purchase order.

**Annual payments schedule:**

Year 1 (May, 2025): \$10,520

Year 2 (May, 2026): \$10,515



Year 3 (May, 2027): \$10,515

Total Payments for the 3-year duration: \$31,550

Products and subscriptions will be invoiced up front for every year as outlined in the schedule above, after receipt of the signed SOW or purchase order. Consulting services will be invoiced at the end of each month as the services are performed.

**Non-Appropriation:** In order to comply with the requirements of Article VIII, Section 3 of the Constitution of the State of Idaho, Contractor understands and agrees that the Client may cancel this contract for any fiscal year when the necessary funds for fulfillment of this contract are not budgeted for, and appropriated by, the Client. The Client may, solely at its option, at the end of any fiscal year of the Client, cancel this contract, without penalty, if the Client determines not to budget or appropriate funds from revenues legally available to it, for the goods and services contracted. Client's fiscal year shall commence on the 1st day of October of each year and shall terminate on the 30th day of September of the following year. In no event shall Contractor be entitled to anticipated profits or consequential damages if the Agreement is canceled pursuant to this non-appropriations provision. Client will notify Contractor of any nonrenewal as a result of this provision thirty (30) days prior to the date of the next annual payment due.

Ownership or Operation by China. Pursuant to Idaho Code section 67-2359, Contractor certifies that it is not currently owned or operated by the government of China and will not for the duration of the Contract be owned or operated by the government of China. The terms in this section defined in Idaho Code section 67-2359 shall have the meaning defined therein.

Quoted fees above exclude any applicable taxes. Taxes include but are not limited to sales tax, value-added tax (VAT), goods and services tax (GST), and any other similar taxes or levies imposed by any governmental authority. Both parties agree to comply with all applicable tax laws and regulations. Client is exempt from sales tax under Idaho Code 63-3622O (f).

Payment is payable upon receipt of invoice. Invoices not paid within 30 days are subject to penalties.

In the event Contractor's fees and expenses are overdue for payment, Contractor reserves the right upon seven (7) days' notice in writing to the client to suspend performance of its services until all outstanding and unpaid invoices have been paid in full by Client. Contractor will not be in breach of scope of "services and deliverables" outlined in the SOW due to customer breach of payment terms.

For questions or changes regarding this quote please contact Florin Ungureanu at florinu@oneplan.ai. Pricing is valid for 30 days from the date of this quotation.

Purchase Orders: Place order by emailing a signed copy of this SOW along with Purchase Order number to florinu@oneplan.ai



**Notes on services fees:**

1. Contractor assumes that all work can be executed remotely.
2. The services fees above do not include travel expenses. Though not anticipated for this engagement, travel and related expenses are additional and will be invoiced at actual cost as incurred. Travel and related expenses must be expressly authorized, in advance, by the Client. Travel will be assessed on a case-by-case basis and defer to any restrictions/cautions from health professionals, State, and local governments.
3. The services fees above do not include any additional software licensing that may be required. Client must provide written authorization for any additional software licensing prior to purchase.



## Authorization

**IN WITNESS WHEREOF**, the parties hereto have caused this SOW to be effective as of the day, month and year first written above.

### Canyon County, ID

**By:** \_\_\_\_\_  
See attached signature page

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### OnePlan Solutions, LLC

**By:** \_\_\_\_\_  
*Michael Stelmakh*

**Name:** \_\_\_\_\_  
Michael Stelmakh

**Title:** \_\_\_\_\_  
Vice President, Customer Success

**Date:** \_\_\_\_\_  
June 24, 2025

## Customer Invoice Information

**PO Number:** \_\_\_\_\_

**Accounts Payable Contact Name:** \_\_\_\_\_




**Accounts Payable Email Address:** \_\_\_\_\_

**Billing Address:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

DATED this 1<sup>st</sup> day of July, 2025.

BOARD OF COUNTY COMMISSIONERS

- Motion Carried Unanimously
- Motion Carried/Split Vote Below
- Motion Defeated/Split Vote Below

	Yes	No	Did Not Vote
 _____ Commissioner Leslie Van Beek	<input checked="" type="checkbox"/>	_____	_____
 _____ Commissioner Brad Holton	<input checked="" type="checkbox"/>	_____	_____
 _____ Commissioner Zach Brooks	<input checked="" type="checkbox"/>	_____	_____

ATTEST: RICK HOGABOAM, CLERK

By: JROSS  
Deputy Clerk