STATEMENT OF WORK [#1]

for Atlassian Consolidation – Discovery

between

Valiantys Limited

and UKHSA

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1. CONTEXT OF THIS STATEMENT OF WORK

1.1. Parties to this Statement of Work

This Statement of Work (this "**SOW**") is entered into as of 8th August 2022, (the "**SOW Commencement Date**") by and between

Valiantys Limited, a company registered in England and Wales under Number 08211416 whose registered office is at ████████████████████████████ ("**Supplier**" or "**Valiantys**") and

United Kingdom Health Security Agency, an executive agency, sponsored by the Department of Health and Social Care organized and existing under the laws of England & Wales, having its principal office at ████████████████████████ ("**Client**" or "**UKHSA**")

pursuant to the

- Valiantys General Terms and Conditions, available on its website.

Hereinafter referred to as the Principal Agreement, and shall be an integrated part thereof. Any term not otherwise defined herein shall have the meaning set forth in the Principal Agreement.

The order of precedence governing this SOW is the terms and conditions constructed in the Principal Agreement between UKHSA and Valiantys, followed by the terms and conditions detailed in this SOW.

1.2. Contract Duration

This SOW shall commence on SOW Effective Date being 8th August 2022

UKHSA or Valiantys may terminate this SOW in accordance with the terms of the Principal Agreement.

2. SERVICES DESCRIPTION SCHEDULE

2.1. Specification of the Services and Deliverables

UKHSA is an organisation consisting of former governmental organisations including, but not limited to: Public Health England; NHS Test and Trace. As part of the rationalisation process and merging of said organisations, UKHSA is looking to understand the possibility to consolidate its Atlassian instances, consisting of Jira Software, Jira Service Management and Confluence to benefit from economy of scale and reduce maintenance costs.

The following Atlassian instances are in scope:

- ████████████████████
- ████████████
- ██████████████
- ████

UKHSA needs to understand the feasibility of consolidating the in-scope Atlassian Jira instances. To gain this understanding, UKHSA has requested the services of Valiantys to carry out a discovery exercise, the outputs of which will be:
- A high-level target solution design,
- A roadmap for delivery of the chosen solution design,
- A Rough-Order-of-Magnitude (ROM) estimate to carry out the work,
- A description of the project approach, key risks and mitigating actions, and UKHSA responsibilities

These outputs will be provided in a report-style presentation.

The discovery exercise will consist of activities that include, but are not limited to:
- Project kick-off with the Project Team and key stakeholders to agree the discovery exercise schedule
- Initial data collection on Atlassian applications to support technical analysis
- Interviews with key stakeholders both functional and operational
- Workshops to outline design principles with business stakeholders
- Technical analysis of the gathered data
- High-level solution design and roadmap creation
- Presentation of findings to business and operational stakeholders
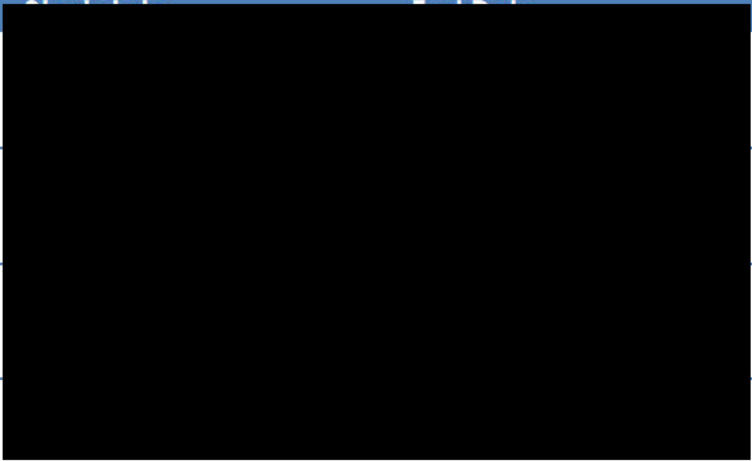- Walkthrough of the solution design and delivery roadmap with the UKHSA Project Team

Details of the meetings, interview and workshops can be found in the Tasks & Activities Summary of the Appendix.

2.2.   Project Plan and Project Milestones

Dates are subject to agreement of the project start date at the signing of the Statement of Work. Project Plan and Project Milestones are to be presented and agreed at the Project Kick Meeting.

The following indicative outline is for reference only and will be agreed at the kick-off session.

No.	Task / Activity Description	Start date	End Date
01	project kick-off with the Project Team and key stakeholders to agree schedule	███████████	███████████
02	initial data collection on Atlassian applications to support technical analysis	███████████	███████████
03	interviews with key stakeholders both functional and operational	███████████	███████████

No.	Task / Activity Description		
04	workshops to outline design principles with business stakeholders		
05	presentation of our findings to business and operational stakeholders		
06	workshop to review key recommendations with the Project Team		
07	presentation of recommendations to Executive Sponsor		

2.3. Risks, Assumptions, Dependencies & Exclusions

The following risks, assumptions, dependencies and exclusions that have been taken into consideration when preparing this fixed price proposal. Should any of the following materially change before or during the project this will need to be discussed in the regular project review meetings and may require a change control as effort/costs could have changed.

Risks

- Delay in any dependencies
- Changes to the instances after the assessment and prior to the consolidation
- Availability of key UKHSA personnel to attend schedule meetings agreed in the kick-off meeting
- Ability of key UKHSA personnel to make decisions in a timely manner, aligned with the project plan

Assumptions

- The total elapsed time is anticipated to be circa 5-6 weeks depending on availability of key stakeholders and access to environments identified.
- NTBS scope will only include the stakeholder interview. The NTBS technical analysis will not be in scope in this Discovery due to the small size and perceived simplicity. A gap analysis will be performed for the consolidation phase.
- Data collection will require a mixture of automated scripts and manual data gathering. There is no impact on performance during the data collection.
- Jira Software, Jira Core, Jira Service Management, Confluence are the applications in scope.

Dependencies

- Valiantys requires access and permissions for Server & Data Centre to collect data:
    - System Admin access for User Interface (source application)
    - Read access on application server (access to local/shared home & installation directory file systems)
    - Read access for application database (accessibility to all tables)
- Availability of the functional administrators of Atlassian tools
- Availability of a system administrator
- Valiantys requires access and permissions for Cloud to collect data
- Site Admin access to User Interface
- Security clearance for the Valiantys Consultants will be completed prior to the start date
- Access and permissions to be provided prior to the start date.

Exclusions

- Cleaning up of any configuration, data, scripts, etc.

3.   KEY PERSONNEL SCHEDULE

3.1.   Key UKHSA Personnel

Role	Responsibilities	Core Team Member	Skills Needed
Executive Sponsor	The Executive is responsible for the business relationship with Atlassian applications and over the success of consolidation initiative.	No	Leadership, Decision making
Implementation Lead (Project Manager)	Responsible for coordinating the internal project team with Valiantys.	Yes	Leadership, communication
Business Owner (one or more per instance)	Own development and communication about the development on the Jira Applications i.e. Product, Program or Portfolio Leader	Yes	Strong knowledge and experience of the business

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Role	Responsibilities	Core Team Member	Skills Needed
Atlassian System Admin (one or more per instance)	A provide support, Q&A, assistance, and guidance to Atlassian users on management of the Atlassian Applications	Yes	Understanding of internal practices, chosen framework and Atlassian tooling. * Recommend these users complete all role-based training classes.
Project Leads (one or more per instance)	A provide support, Q&A, assistance, and guidance to Atlassian users on the project configuration.	Yes	Understanding of internal practices, chosen framework and Atlassian tooling. * Recommend these users complete all role-based training classes.
Technical Lead (one or more per instance)	Ensure all technical connectivity is established in alignment with or exceeding minimum security controls.	Yes	Network, Infrastructure, Security Certificates, Firewall controls, API Gateways
Governance, Risk and Compliance (GRC)	Works with Executive Sponsor, Implementation leader, and Organisation Change Management lead to ensure any required controls for GRC are maintained.	Yes	In-depth knowledge of required GRC controls is needed.
Organisation Change Management (OCM) Lead	Define, create, and plan any organizational change management activities and communications needed to support the deployment.	Yes	In-depth knowledge of internal OCM requirements and controls. Works with Implementation Lead to ensure OCM activities are delivered in alignment.

4.   PRICING AND PAYMENT TERMS

4.1.   Pricing

Professional Services for this project are offered at a fixed price of £26,250.00 (excluding VAT & Expenses)

4.2.   <u>Invoicing Schedule and Payment Terms</u>

This SoW will be invoiced according to the following schedule:

- ███████████████
█ ████████████████████████████
- Invoices are due 30 days from date of receipt.
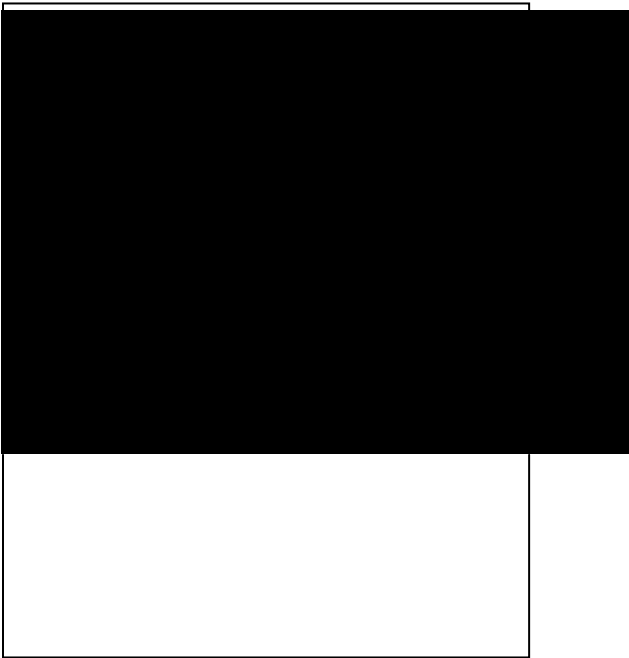
4.3.   <u>Expenses</u>

All pre-approved out of pocket expenses will be reimbursed by UKHSA.

5.   DATA PRIVACY

If Personal Data is processed as a result of this SOW the parties agree to be bound by the terms set out in the Data Processing Schedule found at ████████████████████████

6.   Signature page

IN WITNESS WHEREOF, the parties hereto have caused this Statement of Work to be executed by their respective duly authorized representatives:
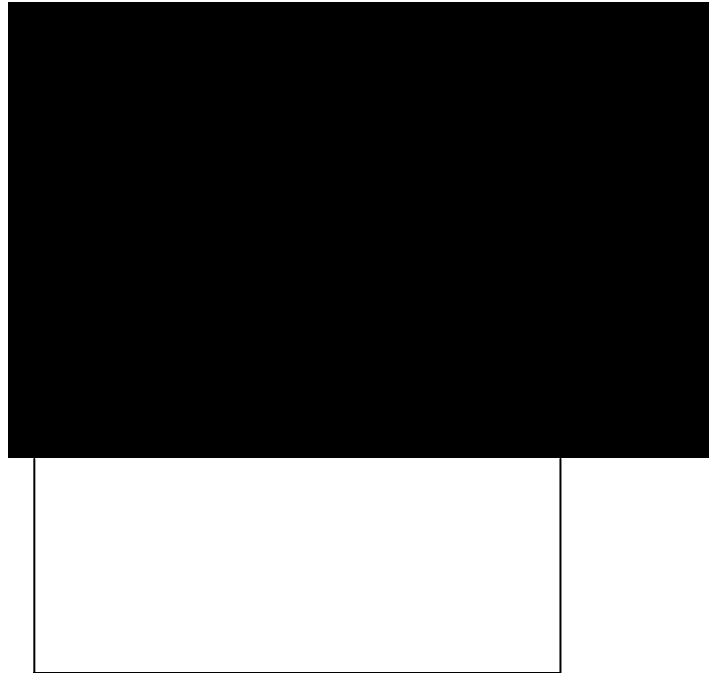
7.   Appendix – Meetings and Workshops

Step order	Step name	Purpose	Objectives	Attendees (Role/Responsibility)	Agenda / Approach	Outputs
1	Kick-off Meeting	Describe to all attendees purpose, objectives and plan for the project. Explain the up coming workshops, meetings, etc. and specify who from UKHSA will be involved at each meeting. Discuss with the team and stakeholders any updates, including but not limited to issues, risks, exceptions, dependencies, etc.	• Agree schedule of workshops, meetings, etc. • Brief stakeholders on their project roles and responsibilities • Update risk, issues, dependencies, exceptions, etc.	Jira Administrators, Infrastructure & Operations Support, Project Managers, managers involved in business processes	• Introduction to Project • Purpose of this workshop • Schedule of meetings • Update on RADE • Questions & Answers	• Agreed Schedule of Meetings • Updated RADE
2	Review functionality of in-scope Atlassian applications with UKHSA Admins	Review of current architecture, size, configuration, and data. Identification of areas of concern. Gathering of metrics used to identify process performance and its bottlenecks in next workshops.	• Meet with Jira Administrators, Infrastructure & Operations Support, etc. to get high level overview of current in-scope Atlassian application instances • Identify areas of concern in configuration, data, processes or add-ons through instance analysis	System administrators, Infrastructure & Operations Support	• System review • Statistics gathering • F2F or online session meeting	• Identification of areas of concern • High-level summary of system infrastructure • Identification of key personnel and update on the list of people required for deep dive sessions
3	Deep Dive into Use Cases and project process/methods	Get business and process background on the problematic projects to help UKHSA to improve metrics related to desired goals.	• Get business background on processes and how they are reflected in the in-scope Atlassian applications • Identify with stakeholders the desired improvements	Project Leads/Managers, stakeholder responsible for processes i.e. Process Owners, Centre of Excellence,	• Data gathering information about current areas of concern for UKHSA such as velocity, quality, effort, etc. and prioritization	• Document with information from the gap analysis • Agreed prioritization of areas to be addressed

Step order	Step name	Purpose	Objectives	Attendees (Role/Responsibility)	Agenda / Approach	Outputs
					• Data gathering information about desired goals, improvements and metrics	
4	Design Principles Workshop	Review of current situation. Definition of problems and issues. Definition expectations and future roadmap. Analysis of potential risks and issues	• Deliver analysis of high level alignment between projects, processes and governance as-is and to-be • Define design principles to be applied in the consolidation and migration • Review and assess risks and issues to agree prioritization for the project	Project Sponsor, Business Owner, and Atlassian System Administrators	• Gap analysis of as-is with good commercial practice • Understand strategic roadmap for the Atlassian eco-system • Identify key areas of risk and issues	• Prioritization of key problems to be addressed • Definition of design principles to govern consolidation • Prioritized Risk and Issue Log
5	Recommendations Workshop	To present and work through: Summary of identified concerns. Analysis of current situation and desired goals. Summary of proposed actions required for consolidation	• Agree prioritization of recommendations • Refine recommendations based on feedback • Refine roadmap for consolidation	Project Sponsor, Business Owners involved in projects, Atlassian System Administrators responsible for current setups	• Summarize recommendations • Recommendation prioritization • Present proposed roadmap	• Documents with analysis and recommendations

Commercially Confidential **Statement of Work**