



Charlotte County

SharePoint Online Intranet Development

Statement of Work V3.0

Dated: June 2, 2026



Infrastructure (Azure)
Data & AI (Azure)
Digital & App Innovation (Azure)
Modern Work
Security



Submitted to



Submitted by



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1. Introduction

This Statement of Work (“SOW”) is executed by and between AgreeYa Solutions, Inc. (“AgreeYa”) and Charlotte County (“County” or “Customer”) for providing implementation services for the County’s Intranet Development on the SharePoint Online (SPO) Modern platform. This SOW will be subject to and will be governed by the “Agreement between Charlotte County and AgreeYa Solutions, Inc. Contract No. 20250363” (“Agreement”).

This SOW covers Implementation of SharePoint Online Intranet, following the successful completion of previous SOW dated September 12, 2025, for “Consultation to Redesign Intranet”. The implementation scope encompasses assessment, design, build, information architecture, governance, custom component development, training, go-live, and post go-live support for the County’s Connect@Work intranet on SharePoint Online Modern.

2. Scope of Services

The scope of the engagement under this SOW is to implement the County’s Connect@Work intranet on the SharePoint Online (SPO) Modern platform that functions as both a communications hub and a centralized portal for County departments and employees.

Under this Statement of Work (SOW), AgreeYa will provide the following:

1. Project Initiation & Planning

- a. Conduct project kickoff meeting and establish project governance.
- b. Request and obtain access to the County’s existing SharePoint 2016 environment, SharePoint Online tenant, and **Sharegate** tool.
- c. Develop a comprehensive project plan with activities, dependencies, milestones, and timeline for County review and approval.

2. Assessment

- a. Perform an assessment of the existing SP2016 intranet using **Sharegate** to evaluate current content, structure, and migration readiness.
- b. Conduct a high-level assessment of the existing SPO Admin Center configuration.
- c. Define taxonomy and managed metadata strategy, advanced search scope, filter needs, site columns, and custom layout requirements.
- d. Deliver a comprehensive Assessment Report with findings and recommendations for County review and signoff.
- e. Conduct an Art of the Possible (AOP) Demo showcasing SPO Modern capabilities (1–2 hours).

3. Requirements Gathering

Facilitate approximately four (4) requirement sessions (1–2 hours each) covering:

- a. Revalidate the Home Hub and Department Site design layout – covered in Week 1
- b. Review Information Architecture (IA) recommendations and requirements – covered in Week 2
- c. Review Governance recommendations and requirements (permissions, security, sharing, taxonomy) – covered in week 2
- d. Review Taxonomy and Advanced Search requirements (taxonomy structure, search scopes, filter needs, and column strategy), and conduct **Taxonomy Package & User Adoption Package** offering Working Sessions (which includes Advanced Search based on Taxonomy) - covered in week 4
- e. Training and Organizational Change Management (OCM) requirements - covered in week 3
- f. Create and deliver a Business Requirements Document (BRD) for County review – Week 4
- g. Signoff on the BRD from County project stakeholders – Week 5.

4. Design & Build

- a. Configure the Hub Site and Department Site layouts using out-of-the-box (OOB) SPO Modern components based on approved requirements.
- b. Conduct Site Design review with the County and incorporate feedback.
- c. Create a reusable PnP Site Template based on the finalized Department Site design for consistent provisioning.
- d. Perform internal testing and fixes on the template prior to production deployment.

5. Custom Component Development (SPFx), Taxonomy, and User Adoption Package Deployment

Develop, test, and deploy the following Custom Web Parts, as well as Taxonomy, and User Adoption Package:

- a. **People Operations Contacts Web Part** – A SPFx web part displaying contact cards
- b. **Taxonomy Package** – Taxonomy Package, which is provided as part of this project, includes the following components:
 - i. **Prebuilt Content Types** serve as an accelerated starting point for the implementation of the taxonomy in M365/SharePoint, which is the foundation for Search, Document Lifecycle/Records Management, and Workflow.
 - ii. **The Information Architecture (IA) Workbook**, which is a detailed project artifact that is informed by Search and Document/Records Management requirements and captures the Taxonomy as it is to be implemented. The IA Workbook maps IA requirements to the corresponding structures in M365/SharePoint (e.g. Sites, Site Columns, Content Types, Term Sets, etc.) and is used by the Taxonomy Deployment Utility to drive the deployment.
 - iii. **The Taxonomy Deployment Utility** (use license only), which is used to deploy the Taxonomy as defined in the IA Workbook to the target environment. The utility provides for a repeatable and error-free process that can be used to deploy to a Test environment, for iterative deployments and enhancements throughout the project, and

for the final deployment to Production. Using this utility ensures that the Taxonomy/IA is deployed exactly as defined in the requirements and in accordance with best practices.

Starting with these components, we enhance/customize the taxonomy to meet your specific requirements. Enhancement/customization is the process of taking artifacts, such as search requirements, the organizations records retention schedule, etc. and customizing the definition of the Prebuilt Content Types as detailed in the IA Workbook.

- c. **User Adoption Package** (Search using Taxonomy) – We address the user experience with our User Adoption Package, which consists of the following components
 - I. **Taxonomy Tiles**, which enables site owners to configure several tiles on a page with different colors, icons, descriptions, etc.
 - II. **Advanced Search**, which renders search results in tabular form and enables the user to refine the results using metadata in the table. This is easier than working with SharePoint’s OOTB search results pages.
 - III. **Enhanced Metadata Capture**, which enables users with the requisite permissions to capture user-defined key/value pairs of metadata, which are searchable. This empowers organizations to crowd-source their users’ taxonomy needs. Users can create taxonomy key/value pairs as needed without having to wait for formal taxonomy structures to be designed and implemented by the governance body.

Includes HTML/UI integration, unit testing, QA testing and fixes, and documentation (admin guide and user guide) for each custom component.

6. Information Architecture & Governance Implementation

- a. Implement Information Architecture including: 1 Hub Site, 1 Staging Site, Taxonomy configuration, permissions setup, and lists/libraries configuration.
- b. Implement governance configurations in the SPO Admin Center (e.g., external sharing policies, site creation controls, subsite restrictions) using OOB settings.

7. Production Structure Setup

- a. Create the production Hub Site and approximately 10 Department Sites using the approved PnP template in SharePoint Online.

8. Training

- a. Develop and deliver the following training programs:
 - SPO Administrator Training – 1 session (2 hours)
 - SPO Content Author Training – 2 sessions (2 hours each)
 - SPO End User Training (Train-the-Trainer model) – 2 sessions (2 hours each)
- b. Create training materials for each audience (Administrator, Content Author, End User) covering how to add columns, update term sets, and modify search layouts among other training contents

- c. Conduct a Knowledge Transfer session (1 session x 1 hour) with a live demo of configuration and layout editing for County administrators.
- d. Deliver an OCM Guidance Session to support the County’s change management strategy.
- e. Support content seeding by Content Authors during the transition period.

9. Go-Live & Post Go-Live Support

- a. Perform production deployment of all pages and web parts, including triggering and verifying the search index crawl.
- b. Execute go-live activities including final validation.
- c. Provide two (2) weeks of post go-live support to address issues, answer questions, and stabilize the environment.

10. Project Closure

- a. Conduct project close-out meeting and obtain final signoff from the County.

3. Approach and Methodology

Our phase-wise approach clearly defines responsibilities between AgreeYa and County to ensure a collaborative, transparent, and structured delivery process. Each phase concludes with concrete deliverables and County signoff before advancing to the next.

| PHASE 1 – PROJECT INITIATION & PLANNING | |
|---|---|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Project Initiation and Project Kickoff meeting | Participate in project kickoff meeting |
| Request access to existing SP2016 environment, SPO tenant, and Sharegate | Provide access to SP2016, SPO tenant, and Sharegate tool |
| Identify project plan activities, dependencies, and timeline | Designate core team members and Single Point of Contact (SPOC) |
| Provide project management throughout the project duration | Attend weekly project status meetings |
| Create and deliver Project Plan for review and signoff | Review Project Plan and provide timely signoff |
| Confirm Taxonomy and User Adoption package readiness and configure dev tenant access for build activities | Provide tenant admin access required for Taxonomy and User Adoption package deployment and dev tenant setup |
| DELIVERABLES: Project Plan | |

| PHASE 2 – ASSESSMENT & REQUIREMENTS GATHERING | |
|---|--|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Perform existing Intranet SP2016 assessment using Sharegate | Provide access to SP2016 environment and Sharegate for assessment |
| Conduct high-level SPO Admin Center assessment (manually) | Provide access to SPO Admin Center |
| Create and deliver Assessment Report | Review Assessment Report and provide signoff |
| Conduct AOP Demo for SPO Modern (1 session of up to 2 hours). | Attend AOP Demo session |
| <p>Conduct requirement sessions (approximately 4 sessions, up to 2 hours each).</p> <ul style="list-style-type: none"> - Home Hub and Department Site layout review and finalization – covered in Week 1 - Information Architecture (IA) recommendations and requirements – covered in Week 2 - Governance recommendations and requirements (permissions, security, sharing, taxonomy) – covered in week 2 - Taxonomy and User Adoption Package scoping and working sessions (taxonomy structure, search scopes, filter needs, and column strategy) - covered in week 4 - Training and Organizational Change Management (OCM) requirements - covered in week 3 | Actively participate in all requirement sessions and provide relevant documentation. |
| Create Business Requirements Document (BRD) for all requirements including custom components. | Review BRD and provide timely feedback and signoff. |
| Conduct solution design and obtain architecture sign-off (page mapping, web part placement, data model) for the Taxonomy and User Adoption Package components | Review and provide signoff on solution design and architecture |
| <p>DELIVERABLES: Assessment Report Business Requirements Document (BRD)</p> | |

| PHASE 3 – DESIGN & BUILD | |
|--|---|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Validate Hub and Department Site layouts using OOB SPO Modern components | Review and provide feedback on Site Design |
| Conduct Site Design review (UAT) with County | Participate in UAT and provide signoff on Site Design |
| Create PnP Site Template based on finalized Department Site | Provide design mockups and branding assets for custom components |
| Develop custom SPFx web part (People Operations Contacts) | Confirm call button functionality requirements for People Operations Contacts web part |
| Internal testing and fixes | N/A |
| Conduct unit testing of the deployed solution | Provide UAT participants and devices for cross-browser/mobile validation; provide signoff on testing outcomes |
| DELIVERABLES: Custom SPFx Web Parts (People Operations Contacts) | |

| PHASE 4 – IA, GOVERNANCE & PRODUCTION SETUP | |
|---|--|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Implement Information Architecture (1 Hub, 1 Staging, Taxonomy, Permissions, Lists, Libraries) | Review and approve IA implementation |
| Implement Governance configurations in SPO Admin Center (external sharing, site creation controls, subsite restrictions) | Review and approve Governance configurations |
| Create one Production Hub Site and 10 Department Sites using approved PnP template | Validate production sites |
| Deploy custom SPFx components to production | Review and validate |
| Configure the Taxonomy Package (Complete the IA Workbook, Setup Taxonomy, Taxonomy customization, Deploy the Taxonomy) | Review and validate |
| Install and configure User Adoption Package , Setup Advanced Search components on select SharePoint Online pages | Review and validate |

| | |
|--|--|
| Perform production deployment of all approved pages, Taxonomy and Advanced Search components to the Hub Site and Department Sites, including site columns, content types, and search schema configuration | Approve production deployment window; provide tenant admin access for deployment |
| Conduct deployment sanity testing | N/A |
| DELIVERABLES: Implemented IA & Governance Configuration Completed IA Workbook Taxonomy customized and deployed User Adoption Package installed and configured on select SharePoint Online pages Custom Components Deployed to Production | |

| PHASE 5 – TRAINING | |
|---|---|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Create SPO Admin Training materials and conduct training (1 session x 2 hours) | Review the SPO Admin Training material. Identify trainees for the training session, and attend training sessions |
| Create SPO Content Author Training materials and conduct training (2 sessions x 2 hours) | Review the SPO Content Author Training material. Identify trainees for the training session, and attend training sessions |
| Create SPO End User Training materials (TTT) and conduct training (2 sessions x 2 hours) | Review the End User Training material. Identify trainees for the training session, and attend training sessions |
| Deliver OCM Guidance Session components (1 session x 2 hours) | Coordinate change management activities internally |
| Create Admin Guide and User Guide for custom components | Review the guides |
| Deliver Admin and End-User Documentation covering how to add columns, update term sets, and modify search layouts | Review documentation and confirm completeness |
| Conduct training on custom components (1 session x 2 hours) | Attend training sessions |
| Conduct Knowledge Transfer session (1 session x 1 hour) with live demo of configuration and layout editing | Identify and schedule attendees for the Knowledge Transfer session |

| | |
|--|--|
| Support content seeding by Content Authors | Perform content seeding with AgreeYa support |
| DELIVERABLES: SPO Admin Training Materials & Recorded Session SPO Content Author Training Materials & Recorded Sessions SPO End User (TTT) Training Materials & Recorded Sessions OCM Guidance Session Admin and End-User Documentation Knowledge Transfer Session (Recorded) Custom Component Documentation (Admin & User Guides) | |

| PHASE 6 – GO-LIVE, SUPPORT & CLOSURE | |
|--|--|
| AgreeYa’s Responsibilities | County’s Responsibilities |
| Execute Go-Live activities and final validation | Participate in go-live validation |
| Perform production deployment of all pages and web parts, including search index crawl trigger and verification | Validate production deployment and provide signoff |
| Provide two (2) weeks of post go-live support | Report issues during post go-live support period |
| Conduct project close-out meeting | Attend project close-out meeting |
| Submit all final deliverables and project closure documentation | Provide final signoff on project closure |
| DELIVERABLES: Go-Live Confirmation Post Go-Live Support (2 Weeks) Project Closure Report & Final Signoff | |

Project Assumptions

The following assumptions have been made in developing this proposal:

1. The intranet will be built on the SharePoint Online (SPO) Modern platform.
2. The County will assign a Single Point of Contact (SPOC) to coordinate project communications, consolidate feedback, and sign off on deliverables in a timely manner.
3. Stakeholder availability and timely participation will be coordinated by the County to avoid delays. All reviews and approvals will be provided within 2–3 business days unless otherwise discussed.
4. The County will provide timely access to the existing SharePoint 2016 environment, SharePoint Online tenant (with appropriate admin permissions), and the Sharegate tool.
5. Sharegate will be provided by the County. No Sharegate license cost is included in this SOW.

6. AgreeYa will provide guidance and support during content seeding but will not perform the actual content seeding.
7. All web parts and components will be out-of-the-box (OOB) SharePoint Online Modern components, except for the one (1) custom SPFx web part (People Operations Contacts), the Taxonomy Package, the User Adoption Package (Search using Taxonomy).
8. Taxonomy customization is time-boxed to eight (8) hours
9. The Taxonomy Deployment Utility is a “use license” only, priced for up to two thousand five hundred (2500) users, and is provided as a **one-time cost**
10. User Adoption Package (UAP) is licensed as a **recurring annual subscription** for up to two thousand five hundred (2500) users
11. UAP is time-boxed to twenty (20) hours
12. Data for the People Operations Contacts web part will be sourced directly from SPO lists.
13. Since all webparts (outside of the 1 custom webpart and the Taxonomy and User Adoption packages) in the mockups are OOB, it is important to note that OOB webparts do not support curved borders and shadows as shown in the design mockups.
14. The following items are explicitly out of scope for the Taxonomy and Advanced Search implementation: multilingual search and translation services; advanced security trimming or custom Role-Based Access Control beyond OOB SPO permissions; cross-tenant content aggregation; custom SPFx development beyond the agreed extensibility points; and complex iterative UI/UX design cycles beyond the agreed display layouts.
15. Any scope changes after BRD signoff will follow the Change Order Management process described in this SOW.
16. No Onsite Travel is considered in our Cost. If any Onsite Travel is requested by County, it will be billed at Actual including Lodging and Food.

4. Timelines

The total estimated timeline for the proposed services outlined in the SOW is **Fifteen (15) weeks**, that includes **two (2) weeks** of post go live support.

5. Change Order Management

AgreeYa uses a structured Change Control process to manage any revisions to finalized requirements. This ensures that scope, timeline, and quality are preserved while maintaining transparency with all stakeholders.

If changes are requested after requirements are signed off, we follow these steps:

1. The Project Manager logs the change request and evaluates whether it falls within the agreed scope.
2. The request is reviewed by a joint change authority (e.g., project steering committee) for approval.

3. Upon approval, the change is incorporated into the plan, re-estimated if needed, and scheduled accordingly.
4. All changes are tracked through a formal log, and a post-implementation review is conducted if the change is significant.

This process will be defined and agreed upon during the project kickoff to ensure County stakeholders have clear visibility into how scope and requirement changes are managed throughout the project.

6. Cost

The total cost of this SOW is **\$88,340.00** (Dollar Eighty-Eight Thousand Three Hundred Forty Only) aligned with the scope of services provided in Section 2 of this SOW. This includes the one-time Cost of Taxonomy Package - Refer to Section 2 (5b), and an annual subscription cost for the User Adoption Package - Refer to Section 2 (5c). However, the Cost of Sharegate tool# is not included.

Invoicing and Payment Terms

AgreeYa will invoice the **Development** fees as per the following schedule.

| # | Invoicing Schedule | Amount |
|-------------------------------|--|--------------------|
| M1 | Upon Delivery of Project Plan | \$14,954.00 |
| M2 | Upon Delivery of BRD and Site Design | \$14,954.00 |
| M3 | Upon Go-Live (Build, Custom Components, and Training Complete) | \$23,925.00 |
| M4 | Upon Completion of Post Go-Live Support | \$5,987.00 |
| Total Development Fees | | \$59,820.00 |

AgreeYa will invoice the **Taxonomy, and User Adoption Package** cost as per the following schedule.

| # | Invoicing Schedule | Amount |
|---------------------------|---|--------------------|
| 1 | Taxonomy Package – On signing the SOW (One Time Cost) | \$18,520.00 |
| 2 | *User Adoption Package - On signing the SOW for Year 1 (This will be a recurring annual subscription) | \$10,000.00 |
| Total Package Cost | | \$28,520.00 |

***Note¹:** After the first year, the **User Adoption Package**, which is an annual subscription cost will be invoiced to County for each subsequent year at least 30 days in advance from the date the previous year’s subscription ends.

#Note²: AgreeYa has assumed that the Sharegate tool will be provided by the County, and the cost of Sharegate license is not included in the above cost. If AgreeYa needs to procure the Sharegate license, it

will be invoiced separately to the County at project start, and the Cost of Sharegate license (Migrate Essentials version with 1 machine activation) will be \$5,995.00 per year.

County will process the invoice within **NET thirty (30)** days upon receipt of the invoice.

7. Location of Work

AgreeYa will provide these services from Global Delivery Center in Folsom, CA; along with any other locations deemed appropriate by AgreeYa.

Charlotte County

Authorized Signature

Name

Title

Date

AgreeYa Solutions, Inc.

Authorized Signature

Name: Ajay Kaul

Title: Managing Director

Date: