



Microsoft Purview, SharePoint & OneDrive Implementation with Share Drive Migration

STATEMENT OF WORK

**San Bernardino County Employees'
Retirement Association**

SOW Date: May 28, 2026

Opportunity #: 1003226600485.1

Valid for: 60 Days

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Client: San Bernardino County Employees' Retirement Association
Opportunity #: 1003226600485.1
Date: May 04, 2026
Title: File Share to 365 Migration

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CONTACT INFORMATION

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1. EXECUTIVE OVERVIEW

1.1. Project Introduction

Presidio is pleased to propose the following solution to San Bernardino County Employees' Retirement Association ("Client"). This Statement of Work ("SOW") defines the tasks to be performed and the responsibilities of Presidio and Client.

The Professional Services as stated within this SOW are subject to and shall be governed by Presidio's Terms of Service Agreement (<https://presidio.com/presidio-terms-of-service-agreement>), which are incorporated into and made a part of this SOW by this reference; unless a valid Master Services Agreement ("MSA") between the parties, if any, for professional services has been executed and is in force at the time any SOW is executed; in which case the terms of the Master Services Agreement shall govern to the extent that they are inconsistent with this SOW.

San Bernardino County Employees Retirement Association ("SBCERA"), a 150 licensed users retirement association, is undertaking a strategic initiative to modernize its information security posture, document management capabilities, and internal collaboration infrastructure. SBCERA is comprised of 6 departments: Fiscal, Member Services, Investments, Administration, Legal, and Information Systems. This Statement of Work (SOW) defines the scope, deliverables, responsibilities, timeline, and governance for the implementation of Microsoft Purview (Information Protection & Compliance), SharePoint Online, and OneDrive for Business, as well as the full migration of all on-premises network share drives to SharePoint Document Libraries.

This engagement is sponsored by the Chief Information Officer (CIO) and will be executed by the SBCERA Information Systems (IS) team with targeted assistance from a Microsoft-certified implementation partner. Successful completion of this project will establish a compliant, governed, and resilient document management ecosystem aligned to SBCERA's security requirements and Microsoft 365 best practices. SBCERA seeks a "white glove" delivery of services and heavy guidance by an industry professional partner.

1.2. Solution and Approach Overview

Leverage the organization's Microsoft 365 investment through SharePoint, Microsoft Purview DLP, Information Protection, Endpoint DLP, and Defender for Cloud Apps as the primary data protection stack across email, collaboration tools, endpoints, and selected SaaS applications.

- Implement Microsoft Purview Information Protection to deliver a data classification framework to classify, label, and protect sensitive data across all M365 workloads for SBCERA departments.
- Deploy Microsoft Purview Compliance (Data Loss Prevention, Retention Policies, eDiscovery, Audit) to satisfy regulatory and litigation readiness requirements.
- Configure SharePoint Online with structured Document Libraries, permission models, metadata taxonomy, and governance policies for all business units.
- Deploy OneDrive for Business for all employees as a personal cloud storage and sync solution, replacing local desktop and network personal share storage.
- Migrate 100% of on-premises shared network drives to SharePoint Document Libraries, with no loss of data, version history where recoverable, and validated access controls.
- Establish an end-user training program and adoption plan to ensure successful platform utilization post-migration.
- Deliver comprehensive technical documentation covering architecture, governance, and operational runbooks.

2. SCOPE OF WORK

2.1. File Share to 365 Migration

2.1.1. Phase 1 – Project Launch

This phase establishes the foundation for the engagement through project kickoff, governance, stakeholder alignment, and environmental readiness assessments. Activities include confirming project objectives, communication and escalation processes, validating Microsoft 365 licensing and security posture, reviewing Entra ID and backup readiness, and ensuring secure administrative access is available.

1. Project launch and governance
 - a. Conduct project kickoff with SBCERA stakeholders to confirm objectives, success criteria, communications, and escalation paths
 - b. Establish project cadence for status meetings, RAID tracking, decision logging, and change control for T&M execution
2. Administrative Credentials: Consultants will be provided with administrative credentials for all systems within the project scope to efficiently complete the project tasks.
 - a. Remote Access: Remote access capability, such as VPN, will allow Presidio consultants to independently access the customer network and work on the project. Alternative forms of access that depend on customer personnel, such as using a shared desktop accessed via Webex or similar solutions, are out of scope.
 - b. Access Deactivation: At the end of the project, the customer is responsible for disabling all credentials and remote access.
3. Perform general environment checks to ensure stability to proceed:
 - a. M365 Tenant – review and document the Microsoft Secure Score number for (MS Defender) and Identity Secure Score (EntraID). Provide feedback on the top 5 critical items which are not currently implemented.
 - b. Entra Connect – review patching/security update status of Entra Connect server, and the Entra Connect application version.
 - c. Presidio will validate licensing entitlements before design begins; unsupported features require license uplift or scope change.
 - d. Customer to confirm reliable Backups for all technologies in scope.
 - e. Document the results of the above in an email. Any unsatisfactory results must either: (1) already be included within the project scope, (2) be added to the scope through an approved project change request, (3) be remediated by the customer, or (4) be acknowledged in writing by the customer as known project risks before work continues.

2.1.2. Phase 2 – Microsoft Purview: Information Protection

This phase focuses on implementing a data classification and protection framework across Microsoft 365. Sensitivity labels, automated classification policies, encryption controls, and reporting dashboards are deployed to secure sensitive organizational data.

Outcome: SBCERA gains a standardized enterprise data protection model that classifies, labels, encrypts, and governs sensitive information across email, SharePoint, Teams, and OneDrive.

1. Design and deploy a Sensitivity Label taxonomy (e.g., Public, Internal, Confidential, Highly Confidential) aligned to SBCERA's data classification policy.
2. Configure auto-labeling policies for Exchange, SharePoint, OneDrive, and Teams.
3. Implement encryption and access restriction rules for Confidential and Highly Confidential labels.
4. Integrate labels with Microsoft Office applications (Word, Excel, PowerPoint, Outlook).
5. Configure label analytics and reporting dashboards in the Purview portal.

2.1.3. Phase 3 – Microsoft Purview: Compliance

This phase delivers regulatory compliance and legal readiness capabilities within Microsoft 365. Key activities include deploying Data Loss Prevention (DLP) policies, retention and legal hold policies, communication compliance monitoring, audit logging, eDiscovery workflows, and insider risk management controls.

Outcome: SBCERA establishes a compliant governance framework that supports regulatory obligations, legal discovery, audit visibility, and proactive risk monitoring.

1. Deploy Data Loss Prevention (DLP) policies for PII, PCI, and PHI data across Exchange Online, SharePoint, OneDrive, Teams, CoPilot, Fabric, and endpoints.
2. Implement Retention Labels and Retention Policies for all document libraries and mailboxes, aligned to a legal hold schedule provided by Chief Counsel.
3. Configure Communication Compliance policies for high-risk communication monitoring.
4. Enable Audit (Standard and Premium) and configure alert policies for high-risk activities.
5. Establish an eDiscovery (Standard) workflow for Legal, including custodian management and content search.
6. Configure Insider Risk Management with a baseline policy set for data theft and policy violations.

2.1.4. Phase 4 – SharePoint Online

This phase designs and deploys SBCERA's SharePoint Online collaboration and document management architecture. The work includes building site structures, document libraries, metadata taxonomy, permissions models, governance policies, and enterprise search capabilities.

Outcome: SBCERA receives a modern, governed, and scalable document management platform aligned to departmental operations and security requirements.

1. Design and provision a SharePoint tenant architecture: Hub Sites, Communication Sites, and Team Sites aligned to SBCERA's org chart.
2. Create Document Libraries for each business unit with standardized folder structures, metadata columns, content types, and views.

3. Configure site-level and library-level permission matrices (Owner, Member, Visitor) mapped to AD/Entra ID security groups.
4. Enable versioning (major + minor), requires checkout policies, and configure approval workflows where needed.
5. Implement SharePoint governance policies (site lifecycle, external sharing controls, guest access policies).
6. Deploy SharePoint Search configuration with promoted results and managed properties for key document types.

2.1.5. Phase 5 – OneDrive for Business

This phase enables enterprise cloud-based personal storage and synchronization for all users. OneDrive policies, desktop folder redirection, endpoint synchronization, storage quotas, and security protections are configured organization-wide.

Outcome: Employees gain secure and centralized cloud storage that replaces local and personal network storage while improving mobility, backup resilience, and data governance.

1. Enable and configure OneDrive for all users via tenant-level policy.
2. Deploy and configure the OneDrive Sync client via Intune/Group Policy to all managed endpoints.
3. Set Known Folder Move (KFM) policy to redirect Desktop, Documents, and Pictures to OneDrive.
4. Configure OneDrive storage quotas per user (default: 1 TB per Microsoft license entitlement).
5. Apply DLP and sensitivity label policies to OneDrive workload.

2.1.6. Phase 6 – Share Drive Migration

This phase executes the migration of on-premises file shares into SharePoint Online. Activities include discovery and inventory analysis, remediation of migration blockers, migration planning, phased execution, validation testing, and user acceptance testing.

Outcome: SBCERA successfully transitions legacy file shares into Microsoft 365 with validated data integrity, modernized access controls, and reduced dependency on on-premises storage infrastructure.

1. Conduct a discovery and inventory scan of all on-premises share drives, documenting total data volume, folder depth, file types, and ownership.
2. Identify and remediate migration blockers: invalid characters, path length violations, unsupported file types, and broken permissions.
3. Design a migration mapping document: source share path to destination SharePoint Document Library.
4. Execute migration in three waves: Pilot (IT department), Wave 1 (low-risk departments), Wave 2 (all remaining departments).
5. Validate post-migration data integrity using checksums and file count reconciliation reports.
6. Customer to perform UAT and complete this process within one week of wave migration

7. Customer may decommission source share drives following a 30-day parallel-run period per wave.
8. Customer to retain an immutable archive snapshot of pre-migration share drive contents for 90 days post-decommission.

2.1.7. Phase 7 – Training & Adoption

This phase supports organizational adoption through role-based training, user enablement resources, and post-go-live engagement activities. Training sessions, quick reference guides, self-service support resources, and adoption surveys are delivered.

Outcome: SBCERA users and administrators are equipped to effectively use and support the new Microsoft 365 collaboration and compliance platform, driving long-term adoption and operational success.

1. Deliver role-based training: End User (1-hour session), Power User (2-hour session), IT Administrator (4-hour technical workshop).
2. Produce a self-service Quick Reference Guide (PDF) for SharePoint, OneDrive, and Sensitivity Label usage.
3. Configure a SharePoint Intranet "IT Help" page with FAQ, training videos, and support ticket link.
4. Conduct a 30-day post-go-live adoption survey and produce an adoption metrics report.

2.1.8. Phase 8 – Documentation

This phase delivers the operational and governance documentation required for long-term support and sustainability. Deliverables include architecture documentation, governance playbooks, operational runbooks, migration procedures, and updated incident response guidance.

Outcome: SBCERA receives comprehensive technical and operational documentation that supports ongoing administration, governance, compliance, and future scalability.

1. Architecture Design Document (ADD): tenant topology, licensing, integration dependencies.
2. Purview Governance Playbook: label taxonomy, DLP policy rationale, retention schedule.
3. SharePoint Operations Runbook: site provisioning, permissions management, lifecycle procedures.
4. Migration Runbook: pre-migration checklist, execution steps, validation procedures, rollback plan.
5. Incident Response Procedure update: data breach escalation paths leveraging Purview Audit and eDiscovery.

2.1.9. Phase 9 – Knowledge Transfer & Close

This final phase transitions ownership of the environment to SBCERA's internal teams. Knowledge transfer workshops, operational handoff sessions, documentation reviews, and formal project closeout activities are completed.

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Outcome: SBCERA's administrators are prepared to independently manage the environment, and the project is formally transitioned into operational support ownership.

1. Documentation and knowledge transfer
 - a. Deliver knowledge transfer sessions for SBCERA administrators covering Purview administration, SharePoint governance, migration outcomes, and operational considerations
 - b. Review delivered architecture, configuration, and migration documentation with customer stakeholders
 - c. Provide administrator-oriented handoff guidance for ongoing support and future policy adjustments
2. Project Closeout
 - a. Participate in the Project Closeout Meeting
 - b. Customer to disable all Presidio accounts and access

2.2. Hours Estimates by Phase

Phase	Description	Solution Architect Hours	Estimated PM Hours	Total Estimated Hours
Phase 1	Project Initiation & Governance	12 hrs	8 hrs	20 hrs
Phase 2	Microsoft Purview Information Protection	105 hrs	11 hrs	116 hrs
Phase 3	Microsoft Purview Compliance	131 hrs	15 hrs	146 hrs
Phase 4	SharePoint Online Deployment	158 hrs	18 hrs	176 hrs
Phase 5	OneDrive for Business Enablement	61 hrs	8 hrs	69 hrs
Phase 6	Share Drive Migration	219 hrs	32 hrs	251 hrs
Phase 7	Training & Organizational Adoption	45 hrs	7 hrs	52 hrs
Phase 8	Documentation & Operational Readiness	32 hrs	7 hrs	39 hrs
Phase 9	Knowledge Transfer & Project Closeout	12 hrs	9 hrs	21 hrs
	Total	775 hrs	115 hrs	890 hrs

2.3. Out of Scope

1. Deployment or configuration of Endpoint DLP, Defender for Cloud Apps, or selected SaaS applications (none were specified)
2. Custom application development, scripting beyond standard implementation needs, or product engineering
3. Ongoing managed services, help desk, or long-term operational support after project close
4. End-user data cleansing, records management decisions, or legal disposition decisions performed by Presidio
5. Non-Microsoft 365 platform remediation not directly required for the in-scope migration
6. Any work for inaccessible source data until customer provides required permissions or access resolution
7. Decommissioning or deletion of source share drives
8. Backups or snapshots of share drives
9. Onsite support services
10. Operational support, including unscheduled or emergency assistance
11. Procurement or acquisition of software or hardware
12. Purchase, acquisition, or troubleshooting of software licenses, including Microsoft or migration tool licensing
13. Certification-related training
14. Resolution of end-user desktop issues, including installation or upgrades of desktop software
15. Any other deliverables, hardware or software installations, or application configurations not explicitly stated in the project scope

2.4. Project Specific Assumptions

1. SBCERA holds active Microsoft 365 Business Premium or E3/E5 licenses sufficient to enable all Purview, SharePoint, and OneDrive features in scope.
2. An Entra ID (Azure AD) tenant is already provisioned, and users are licensed.
3. Network connectivity between on-premises share drives and the migration server meets a minimum of 1 Gbps sustained throughput.
4. A VM where the Sharegate migration tool and scripting will be configured is available.
5. Sharegate user licenses are available.
6. Migration accounts bypassing MFA are available.
7. A global admin account access is available to allow management of SharePoint Online environment, OneDrive, Purview, site structure creation, and PowerShell scripting.
8. Executive and department head sponsorship will be available to support communication and adoption activities.
9. Legal and HR will provide the retention schedule and communication compliance requirements within the first two weeks of the project.

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10. All on-premises file servers are accessible from the migration workstation during scheduled migration windows.
11. The current size of the network share is about 6.7TB. However, the size will continue to increase until the cutover happens.
12. Customer-owned file cleanup, permission rationalization decisions, and records disposition remain SBCERA's responsibility.

3. ENGAGEMENT INFORMATION

3.1. Resources

Presidio approaches project execution from a skills-based perspective. Our Execution Team comprises individuals with specific skill sets that will be used at different stages of a project. This enables us to provide the Client with a highly specialized workforce and to utilize the appropriate resources for the required task. The Project Manager or Project Coordinator will distribute contact information for the project team personnel.

The following Presidio resources will be engaged in this project:

Resource Name	Discipline
Project Manager	MSFT
Senior Software Engineer	MSFT

3.2. Locations

All services outlined in this SoW will be performed and delivered remotely unless otherwise specified. Services described in this SoW may be performed or will impact the following locations.

Location	Address	City State ZIP
San Bernardino County Employees' Retirement Association	348 W. Hospitality Lane, Suite 100	San Bernardino, CA 92408

3.3. Outcomes and Deliverables

Documentation may be created by Presidio and provided as part of the Project Deliverables. Some of these deliverables may be delivered as a single document. The specific documentation to be provided depends on your chosen solution(s).

Client's acceptance of all deliverables described in this SOW and of the completion of the project shall be in writing. Deliverable acceptance shall be in the form of an email or signature (as applicable), and final project acceptance shall be in the "Project Completion Signoff" form provided by the Project Manager or Project Coordinator. If acceptance is refused, the Client shall provide, in writing to Presidio, a reason for refusal. Presidio shall address the issue before subsequent work is undertaken.

For any documentation provided, it shall be reviewed and approved by the Client in accordance with the following procedure:

- If a written list of requested changes is received within five (5) business days, the Presidio Project Team will make the agreed-upon revisions and resubmit the updated version to Client within five (5) business days.
- At that time, the Client has five (5) business days to review and request changes for the final document. If no written response is received from Client within five (5) business days, either accepting or requesting changes, then the deliverable material shall be deemed accepted.

4. PRESIDIO PROJECT COORDINATION

4.1. Project Coordination Scope

Presidio will provide a Project Coordinator (PC) and a Project Manager (PM) who will support the administration of this project and support the Presidio engineers with resource scheduling and billing issues.

Included in our standard Project Coordination offering for this engagement are the following:

- Remote kickoff meeting scheduling
- Resource scheduling and oversight
- Escalation facilitation
- Project closure and acceptance sign-off

Included in our standard Project Manager offering for this engagement are the following:

- The Project Manager shall function as the primary point of contact for this engagement. Project Management responsibilities include, but are not limited to:
- Conduct a kickoff meeting to ensure all project deliverables are outlined and sets proper project expectations.
- Ensure project timelines, dependencies, budgets, and closure are met within the project lifecycle.
- Hold weekly status meetings with the Customer and the delivery team to proactively identify any issues to mitigate risk, review project status, open action items, and upcoming tasks.
- Provide weekly time reporting to the Customer for T&M projects.
- Issue weekly status reports to the management of all companies involved in the project.
- Facilitate any necessary change orders and administrative tasks, as necessary.
- Create and maintain a stakeholder matrix throughout the project.
- Track risks and issues and communicate those in status meetings and on status reports.
- Conduct a final project Close-Out Meeting and receive Project Sign-Off from the Customer.

5. PRESIDIO PROJECT MANAGEMENT (PPM)

5.1. Project Change Request Process

Any Items that are determined to be outside of this Statement of Work and deliverables defined must be submitted with a Project Change Request (PCR) Form. No work outside of this Statement of Work will be undertaken without written approval and processing of a Project Change Request.

In the event that both Presidio and Client agree to a change to this Statement of Work, a written description of the agreed-upon change will be prepared using a Project Change Request (PCR) form, which both parties must sign. The PCR form will be used to describe the change, provide the rationale for it, and specify any changes to scope, schedule, or budget.

The terms of a mutually agreed-upon Change Request will prevail over those of this Statement of Work or any previous Change Request.

Modifications in project scope, including but not limited to the following, will require a Project Change Request:

- Client-requested changes in outcome, approach, features, or capabilities.
- Additional required tasks discovered through the planning and design review but not mentioned in this SOW, or changes to the design after the signoff of the design phase and/or during the implementation phase.
- Upgrade, modification, or repair of equipment or applications to effectively deploy this scope.
- Defective equipment provided by the Client and integrated into the solution requiring additional diagnostic troubleshooting and/or remediation.
- Troubleshooting issues due to Client changes to configurations made “after” releasing the system or “after” a specific milestone completion in a multi-site phased deployment.
- Delays due to issues relating to site preparation that result in delays to the project.
- Delays in responding to scheduling requests, acceptance requests, and requests for information.
- Insufficient notice of a schedule change. If a 24-hour notice is not provided, charges may be applied.

6. ASSUMPTIONS & RESPONSIBILITIES

Presidio makes the following assumptions and has identified the following Client responsibilities in developing this Statement of Work. These assumptions and responsibilities serve as the foundation on which the project estimate, approach, and timeline were developed. By signing this SOW, Client agrees that these assumptions and responsibilities are correct and valid. Any changes to the following assumptions and responsibilities must be processed using the Presidio Change Management Process and may impact the project duration and labor requirements.

6.1. Engagement Assumptions

The following project assumptions are made and will be verified as part of the engagement:

- Client has read and agrees with all Items contained or omitted within this Statement of Work.
- This SOW supersedes all prior written or oral agreements, representations, and understandings related to the subject matter hereof. Any purchase order submitted pursuant to this SOW shall be subject to the terms herein and shall not be subject to any new or different terms, including pre-printed terms on such order. All changes to this SOW must be executed in writing and accepted by both parties, as indicated by authorized signature, prior to the execution of work.
- Presidio will hold no responsibility for any changes made "after" releasing the system to the Client. Presidio expressly disclaims any liability for non-performance or the delivery of poor quality of services resulting from errors or omissions in information provided to Presidio by Client, whether Presidio knew or should have known of any such errors or omissions, or whether Presidio was responsible for or participated in the gathering of such information. Significant delays, revisits, or cancelled changes outside of Presidio's control may necessitate a change order to account for rescheduling.
- Working Hours: Presidio and Client will jointly agree on the location of the resources, onsite requirements, and what time the services will be provided. By default:
 - Services delivered by resources working in North America and Europe will be provided from 8 AM to 5 PM, relative to the local time zone of the assigned resources, Monday through Friday, excluding standard Presidio holidays specific to the resources' location.
 - Services delivered by resources working in India will be provided from 11 AM to 8 PM IST, Monday through Friday, excluding standard Presidio holidays specific to the resources' location.
 - Resources may work hours other than those defined as normal business hours to accommodate their travel schedules and time zones.
- Any Items or tasks not explicitly listed as in-scope within this SOW are considered to be outside of the scope and not associated with this SOW and price.
- If integration of the product is performed at a Presidio facility, then transfer of ownership (acceptance) occurs upon the receipt and integration of goods at Presidio, regardless of shipment, as manufacturers will not accept returns of opened products.
- Presidio will not be responsible for troubleshooting networks, applications, and/or hardware if the Client does not have formal change management documented processes and policies.
- Presidio may engage subcontractors and third parties in performing a portion of this work.
- Presidio will not make changes to the configuration of any network equipment after it has been installed and tested.
- Some activities included in this project may be performed on Presidio's premises.
- Not all features or functions of the installed system are included in the scope of this engagement.

- Presidio reserves the right to modify the approach outlined within this SOW if it does not alter the timeline or overall outcome of the engagement.
- Presidio will configure the systems outlined within this Statement of Work with a unique set of authentication credentials unless otherwise provided by the Client. Upon the completion of the engagement, Presidio will provide Client with all usernames, passwords, and additional authentication information that were implemented during the engagement. Presidio strongly recommends that these credentials be changed upon the completion of the engagement.
- Any documentation will be delivered in Presidio format unless otherwise stated in this SOW.
- Project success criteria will be defined by the Client and jointly agreed to with Presidio.
- Client staff will participate throughout the implementation.

6.2. Time and Materials Assumptions

- Time and Materials engagements do not provide defined deliverables unless explicitly stated in this SOW. To the extent that documentation or other task-related materials or deliverables are required, time spent preparing, delivering, and reviewing those deliverables will accrue against the hours purchased.
- Hours for Time and Materials services are best-effort estimates; additional hours may be required to satisfy the request. If Client's objectives are not met at the end of the allotted hours, a new Purchase Order and SOW must be submitted.
- For Time and Materials services, it is the Client's responsibility to direct the Presidio consultant's activities by creating a prioritized Task List or similar documented instructions. It is recommended that this be provided to the Presidio Engineer 48 hours prior to the first day of services.
- Time and Materials Services will be invoiced monthly and based on actual hours incurred. For hourly service, a four (4) hour daily minimum applies for remote services, and an eight (8) hour daily minimum applies for on-site services.
- Services to be performed in this engagement assume the execution of outcome-based work with defined deliverables and, as such, require Presidio resources' time to be scheduled to deliver said outcomes and deliverables. As part of the engagement kickoff ("Client Kickoff" or "CKO"), Presidio will present Client with the "Resource Schedule" for the engagement, outlining expectations (by resource and by month) for the consumption of billable hours.
- For ad-hoc/unscheduled work, Presidio will engage on a best-effort basis but cannot commit to defined response times. Billable hours for unscheduled work will be applied to each resource's monthly minimum billable hours, as described below.
- To pause work or delay the project, Client must give Presidio written notice of pause or delay no less than two (2) weeks before the requested date of pause or delay. If Client does not provide adequate notice of a pause or delay under this section, Client is responsible for the monthly minimum billable hours for each resource, as described below. A pause or delay in the project may result in temporarily or indefinitely losing allocated resources, depending on the availability of resources when work resumes. Client can retain the originally allocated resource(s) and/or team by paying an hourly rate of eight (8) hours per day for each retained resource each business day until work resumes or the project begins.

6.3. Client Responsibilities

The following Items are listed as the Client's responsibilities for this engagement. Client is responsible for performing the Items and activities listed in this section or arranging for them to be performed by a third party if appropriate.

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- Provide a primary contact and a secondary contact when the primary is unavailable with the authority and the responsibility of issue resolution, and the identification, coordination, and scheduling of Client personnel to participate in the implementation of the SOW. Without a single Client point of contact, a Project Change Request may be required for the additional effort by Presidio.
- Be responsible for having in place active manufacturer support contracts on all devices that are the subject of this SOW.
- If on-site services are required and authorized, Client will:
 - Provide all required physical access to Client's facility (identification badge, escort, parking decal, etc.), as required by Client's policies.
 - Validate the site readiness prior to the dispatch of Presidio personnel to perform the services being contracted.
- If system access is required:
 - Provide all required functional access (passwords, IP address information, etc.), as required for Presidio to complete the tasks.
 - Provide high-speed access to the Internet for verification of device support requirements and for software downloads.
 - Provide VPN remote access for troubleshooting and configurations related to the project, as necessary. Utilizing Webex, Microsoft Teams, or other similar screen-sharing / meeting technology as opposed to independent VPN access or virtual desktop is out of scope. If there is no other option, Presidio will issue a Change Request to add additional funds to the project to accommodate the increase in time and effort.
- Provide required and requested documentation or information needed for the project within two (2) business days unless otherwise agreed to by all parties.
- Provide Presidio with access to their systems, appropriate processes, and personnel as reasonably necessary for Presidio to fulfill its obligations.
- Where appropriate, knowledgeable resources will be made available for functional questions and making business decisions. It is also expected that Client staff will participate throughout the implementation.
- Participate in all working sessions as required to produce the success and efficacy of the services rendered.

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7. PRICING

Presidio will provide the services outlined in this Statement of Work for a fixed fee of **\$224,500.00**.

- Presidio will bill Client upon signing of this Statement of Work.
- If Client delays the project start or delays work on a subsequent milestone, Client must give Presidio written notice of delay no less than two weeks before work was scheduled to begin. If Client does not provide adequate notice of the delay, Client may be liable to pay an amount equal to the milestone to be delayed, as set out in the Project Pricing section.

7.1. Time and Materials Services

Services will be delivered on a Time-and-Materials basis, plus reimbursable expenses. The estimated total cost for this engagement, including professional labor services and associated expenses, is **\$224,500.00**. The Client's Purchase Order should reflect this amount. The applicable Time-and-Materials service rates are outlined below.

Resource Name	Hours	OT Hours	Sell Rate	OT Rate	Total Sell Price
Senior Software Engineer	775	0	\$260.00	\$390.00	\$201,500.00
Project Manager	115	0	\$200.00	\$300.00	\$23,000.00
				Total	\$224,500.00

- Presidio will provide a good-faith, best-effort estimate of the labor required to meet the Client's requirements as described in this document. All cost estimates are provided for planning purposes only, are not guaranteed, and are not intended to establish a fixed-price or not-to-exceed arrangement.
- Based on project requirements, additional hours may be necessary to fully complete the defined scope of work. In such cases, Presidio may submit a Project Change Request (PCR), in accordance with this SOW, to request approval for additional hours. No additional hours will be added to the project without the Client's prior review and written approval of the PCR.
- Client will receive invoices upon completion of the project and/or at the end of each calendar month, regardless of engagement status, for the actual hours worked, subject to applicable minimums and expenses.

7.2. Additional Expenses

Presidio is not anticipated to incur any travel or incidental expenses associated with the execution of this SOW. If travel to the Client's facility is requested and authorized by the Client, all authorized, reasonable travel and expenses will be reimbursed to Presidio at actual cost within 30 days of the Client's receipt of an invoice.



8. APPROVAL SIGNOFF

The use of signatures on this Statement of Work ensures agreement on project objectives and the work to be performed by Presidio.

Presidio's signature signifies our commitment to proceed with the project as described in this document. Please review this document thoroughly, as it will be the basis for all work performed by Presidio on this project.

This Statement of Work is valid for a period of 60 days from the date that this Statement of Work is provided by Presidio to Client unless otherwise agreed to by both parties.

San Bernardino County Employees' Retirement Association

Signature

Date mm-dd-yyyy

Printed Name

Title

PRESIDIO

Signature

Date mm-dd-yyyy

Printed Name

Title