

Statement of Work

GRAINGER
RIGHT TO RENT

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1 STATEMENT OF WORK

1.1 OVERVIEW

Grainger have a legal requirement to check that residential tenants in their English properties have a legal right to rent (R2R).

There is currently limited system functionality to ensure the Tenant Progression Team (TPT) & Renewals follow-up on R2R documentation. At new let, R2R records and corresponding tasks are automatically created in Salesforce, and manually-maintained reminders to follow up on expiring R2R documentation are saved in Qube diaries. There is a heavy reliance on the Renewals Team to follow-up on expired R2R documentation when leases are renewed which adds additional burden to a lengthy and time-sensitive renewals process.

Grainger require a more robust process that is independent of the renewals process, will improve compliance, and provide an audit trail of follow-up activities.

The proposed solution would utilize Salesforce to automatically create tasks for the appropriate users to obtain R2R documents as well as generate requests to residents to provide updated documentation, where necessary.

1.2 SOLUTION OVERVIEW

The proposed solution would contain the following key features:

1. [42] days prior to a current resident's R2R expiring:
 - a. Automated creation of R2R records and corresponding tasks for Onsite Property Management, provided the resident has not already provided notice to quit (NTQ).
 - b. Automated email notification and chaser emails to the resident to provide updated R2R documentation.
 - i. Ability for residents to reply to the email and have their response displayed in Salesforce against the related R2R record
 - ii. Ability for users/task owners to see where the resident does not have an email address on Salesforce, or where the email has bounced.
2. Where a current resident does not provide updated R2R and 12-months has not yet passed since the last R2R check date: Automatically deferring the task and any further chaser emails until the 12-months after the last R2R check date, thereafter resuming chaser emails.

3. On change of sharer (COS), automated creation of R2R records and corresponding tasks for the Renewals team to obtain R2R documentation for any new sharers mid-term or at renewal.
4. When viewing a new let, COS or renewal opportunity, give users the ability to see any unlimited, un-expired & outstanding R2R records for all residents linked to the opportunity.
5. Additional validations when capturing R2R information to ensure an expiration date is captured where relevant, and to ensure checks for new residents are not completed too far in advance.
6. The ability to capture whether a clause mitigating outstanding R2R documentation has been included in new let or renewal contracts, and new validation on those opportunities to ensure that this clause is included if there is any outstanding R2R.
7. New validation on mid-term COS opportunities to ensure all required R2R documentation has been obtained before the opportunity can be completed.
8. Automatically closing any outstanding R2R records and corresponding tasks if the resident provides NTQ, and automatically recreating or reopening the R2R records and corresponding tasks if the resident rescinds their NTQ.
9. Ability for users to capture a history of notes on the R2R record, see a full history of emails generated to the resident, and see a full audit history of changes made.
10. Where a resident is reported to the Home Office, additional validation to ensure the Home Office report is uploaded to Salesforce to before closing the R2R record and task.
11. Providing ad hoc data extracts to assist with validation of existing tenancy data in Salesforce. (For example, providing a list of units with more than one active tenancy in Salesforce.)

1.3 OBJECTIVES

The objectives of this project are to:

1. Assess the key solution requirements, in consultation with Grainger.
2. Design a solution that aligns with the current Grainger org, Salesforce features, best practices and minimises technical debt.
3. Compile a project backlog of user stories.
 - a. Prioritize the user stories on the backlog (in collaboration with Grainger).

- b. Size the backlog by weighting the features relative to each other.
 - c. Define the acceptance criteria for user stories. Acceptance criteria will be reviewed and agreed with Grainger.
4. Provide a revised forecast of the number of sprints, cost & timeline required to deliver the project backlog.
- a. Note that costs and timelines are forecasts will be continuously refined throughout the project, based on continuous feedback, backlog refinement and re-prioritization.
5. Deliver a solution containing the key features listed in the [Solution Overview](#).

1.4 DELIVERY APPROACH

The delivery approach will be based on the SCRUM framework. Iterative delivery is achieved through a series of 3-week sprints.

An agile delivery approach allows for the early delivery of outcomes and provides flexibility to adjust for any unforeseen opportunities or issues uncovered during the project.

A backlog will be maintained to track outcomes to be delivered and indicate priority of these outcomes relative to each other. The backlog will be a living artifact that will evolve as Open Box and Grainger collaborate towards maximizing the value delivered. Grainger stakeholders will have access to the backlog which will serve as the single source of truth with regards to scope.

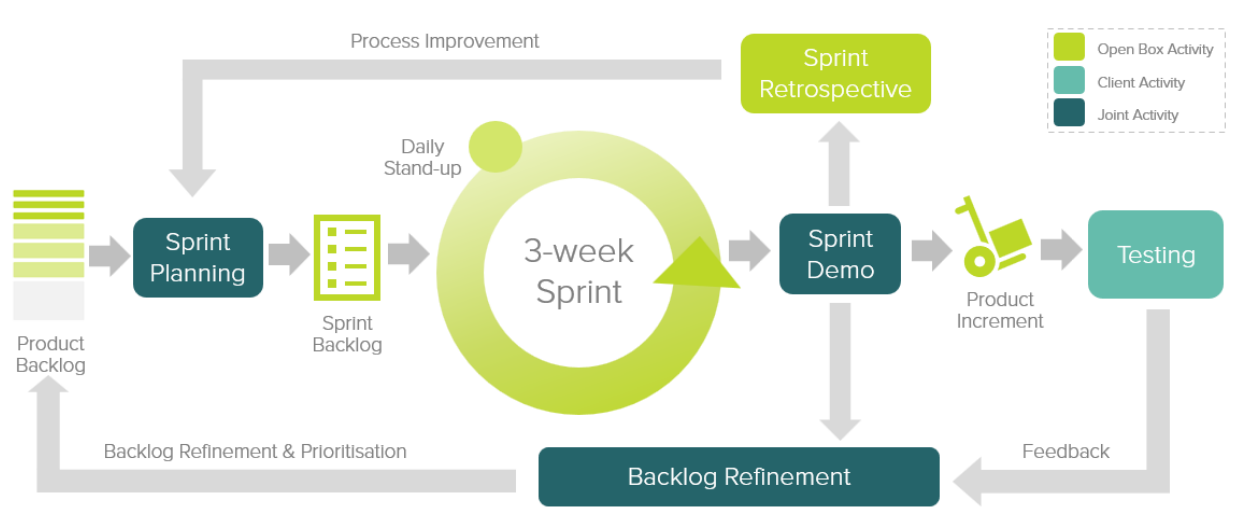


Figure 1: Agile Delivery Approach

Grainger representatives will be required to participate in the following during each sprint cycle:

- **Backlog Refinement** – Open Box and Grainger representatives will meet to prioritize use stories on the backlog as well as review and agree on acceptance criteria for user stories at the top of the backlog.
- **Demo** – Open Box will meet with Grainger representatives to demonstrate the outcomes delivered in the past sprint.
- **Sprint Planning** – Outcomes on the backlog will be selected for the next sprint.
- **Testing** – Open Box will be responsible for unit testing and QA testing of all functionality. Grainger representatives will conduct user acceptance testing of new functionality delivered in each sprint and provide feedback within 1 week of the demo.
- **Stand Up** – Regular, 15-minute stand-up calls will be held to report on progress; the Grainger product owner is expected to participate in this call to provide feedback and give input on any questions that arise.

Feedback from demos and testing will be classified as either bugs or enhancements (depending on the user story and acceptance criteria). Bugs will be fixed in a subsequent sprint, whereas enhancements will be incorporated into the backlog and prioritized accordingly.

1.4.1 UAT

Designated Grainger business users will be given access to a UAT environment to test the functionality end-to-end and ensure that the overall solution is functioning as expected.

Issues raised will be classified as bugs or enhancements (as above). Bugs will be fixed during the UAT period. Any other enhancements or new requirements will be added to the product backlog for future development.

1.4.2 Support

Open Box will provide post go-live support for 10 working days immediately following the production deployment.

1.5 RESPONSIBILITIES

1. Open Box will be responsible for:
 - a. Providing the services described in the project [Objectives](#).
 - b. Delivering a progress report to Grainger on a regular basis that will include:
 - i. General status update
 - ii. Project risks
 - iii. Milestones and timeline
 - iv. Any significant changes to project scope, cost or timeline forecasts.
 - c. Providing a user guide prior to go-live.
2. Grainger will be responsible for:
 - a. Making an internal product owner available to facilitate decision making.
 - b. Making key personnel and stakeholders available throughout the project lifecycle, including participation in the activities detailed in the [Delivery Approach](#).
 - c. Any Salesforce data cleansing required.
 - d. Delivering any required information or content (e.g. email text) in a timely manner.

1.6 AVAILABILITY

1. Open Box resources will be contactable and available for meetings via conference calls:
 - a. Monday to Friday 9am – 6pm South African time (GMT +02:00) which currently corresponds to 8am – 5pm (BST), excluding public holidays.
2. A defined escalation path will be provided to the agreed project manager should urgent assistance be required outside of these times.
3. All work will be completed by Open Box offsite.

1.7 REFERENCES

- Proposed R2R System Process – HDT

2 ASSUMPTIONS, EXCLUSIONS & LIMITATIONS

2.1 ASSUMPTIONS

The following assumptions have been made; incorrect assumptions may affect cost and timelines.

1. There will be a single R2R process.
 - a. There will not be separate process for residents in Welsh properties. These residents will follow the identical process to residents in English properties, allowing for users to close the task and R2R record if the resident does not provide the documentation.
2. Grainger Trust residents will be excluded from the R2R process.
3. The existing Right to Rent object (Right_to_Rent__c) will continue to be used in Salesforce, subject to modifications.
4. A complete and up-to-date list of residents currently occupying a unit may be sourced from the most recent Opportunity record in Salesforce.
 - a. Opportunity contact roles for a mid-term COS opportunity will include all current residents.
5. There are no other projects / dependencies that will delay the Go-Live date beyond our project timeline.

2.2 LIMITATIONS

1. The existing tenancy data (such as tenancy status) may need to be reviewed and updated in Salesforce.
 - a. While reports may be provided to assist with existing tenancy data validation and cleansing, Grainger will be responsible for making any data updates in Salesforce.
2. The solution will not include any Salesforce data model changes. It is anticipated that future projects (e.g. Renewals) may impact aspects of the Salesforce data model that are relevant to the R2R process, requiring future enhancements to the process.
3. Further enhancements to this process may be required if the Rent Reform Bill is enacted.

2.3 EXCLUSIONS

The following is not included in the cost or scope of this project:

1. Data migration (for example migrating existing R2R data in Qube to Salesforce).
2. Email template design for emails sent to tenants during the R2R process.
3. Solution documentation, other than user stories.
4. End-user training or change management, other than provision of a user guide.
5. Third-party costs, license fees, subscriptions or services.
6. Hardware and infrastructure.
7. Release 1 may not address the full project backlog. The following functionality may be addressed in future releases:
 - a. Ability for residents to click on a link in the email and enter their share code and other relevant details, thereby updating the R2R record in Salesforce.
 - b. Possible API integrations to automate the validation of share codes.

3 COST AND TIMELINES

Open Box will provide the following services:

- A Salesforce Technical Architect and Senior Business Analyst will conduct Sprint 0 for the project on a Time and Materials (T&M) basis at £150 per hour. During Sprint 0, the solution requirements will be assessed, release 1 of the project will be scoped and estimated, and sufficient analysis will be conducted in order to commence Sprint 1 development.
 - Sprint 0 is estimated to require 2 - 3 weeks to complete and utilize 40 - 60 hours.
 - The cost for Sprint 0 is therefore estimated to be £6 000 - £9 000.
 - Billable hours for Sprint 0 will not exceed 60 hours without prior agreement from Grainger.
- An agile sprint team delivering sprints at a cost of £23 400 per sprint.
 - Release 1 is currently projected to require 1-2 sprints (£23 400 - £46 800).
 - This will be confirmed after Sprint 0 has been completed to ensure any additional complexity can be included if required.
 - The team will be staffed to include the following skillsets as required:
 - Salesforce Architect
 - Business Analyst
 - Developer
 - Quality Assurer
 - Project Manager
- UAT support at a minimum cost of £1 800 per week.
 - Open Box has included 2 weeks (10 working days) cover to be provided to support the [UAT](#) process and fix any new bugs identified (£3 600).
 - UAT support will be billed for the duration of the UAT period (i.e., from the end of the final sprint until UAT sign-off by Grainger) on a pro-rata basis.
- Production deployment & and post-go live [support](#) at a minimum cost of £1 800 per week.

- Open Box has included 2 weeks (10 working days) cover to be immediately following the production deployment (£3 600).

The project is estimated to start 9th September 2024.

- The total project duration is expected to be 7 - 11 weeks to deliver release 1 in production, as well as an additional 2 weeks for post go-live support.
- The total cost is therefore estimated to be £39 750 - £66 150.

Project Phases	Duration	Lower Bound	Upper Bound
Sprint 0	2-3 weeks	£ 6,000	£ 9,000
Sprint 1 - 2	3-6 weeks	£ 23,400	£ 46,800
UAT	2 weeks	£ 3,600	£ 3,600
Production Deployment & Post Go-Live Support	2 weeks	£ 3,600	£ 3,600
User guide creation	Done in parallel with sprints	£ 3,150	£ 3,150
Total	9 -13 weeks	£ 39,750	£ 66,150

These costs and timelines are forecasts that will be refined at the end of each sprint based on continuous feedback, backlog refinement and re-prioritization.

All amounts are quoted in GBP and exclude VAT, if applicable.

Project costs will be billed monthly, in arrears.

This quotation is valid for 30 days.

3.1 EXTENSION OF SERVICE PERIOD

The provision of these services may be extended, by mutual agreement between Open Box and Grainger. Email communication is considered sufficient and binding for this purpose.

4 ACCEPTANCE

The parties hereto, each acting under due and proper authority, have executed this Agreement as of the day, month and year first written below.

For and on behalf of Open Box Software

For and on behalf of Grainger

Signature: _____

Signature: _____

Name: Sam Duncan

Name: _____

Position: Salesforce Director

Position: _____

Date: _____

Date: _____

5 APPENDIX A – PROPOSED PROCESS DIAGRAM

