

Statement of Work (SOW)
Designed for U.S. Professional Services Consulting

Overview

This Statement of Work (SOW) must be used for all U.S. projects with the following types of Professional Services: Management, Business and General Consulting, HR Consulting, Accounting, Audit and Tax, Professional Services Other (e.g., Investigative and Due Diligence and Lobbying).

For projects of \$500K or more: Before engaging with a consulting firm or completing this SOW, you must contact Global Supply Management (GSM). They will manage supplier selection, competitive bidding and price negotiation.

Instructions

Please follow these instructions to complete and submit this SOW:

1. Answer questions highlighted in yellow. They are required.
2. Answer questions highlighted in blue if they are applicable. Delete them if they are not.
3. Delete this instruction page after completing the SOW.

If you have any questions about professional services consulting projects, please visit [GSM site on Square](#).

EXHIBIT 1

STATEMENT OF WORK (SOW)

Supplier: [Name and Address]

Statement of Work Number ("SOW"): [CAFAE# or Contract ID (CW#)]

Master Agreement Number ("Agreement"): [Contract ID (CW#)]

Date of SOW:

SOW Title:

This SOW is issued pursuant to the above referenced Agreement entered into with the above named Supplier. This SOW is effective when executed by both Supplier and the Amexco Entity executing this SOW and forms a separate agreement which hereby incorporates by reference, the terms and conditions of the Agreement, as amended and modified in this SOW. Any term not otherwise defined herein, shall have the meaning specified in the Agreement.

Amexco Project Manager:	Supplier Location:
Supplier Project Manager:	Written Status Reports are required:
	[Yes / No] – [If yes, insert applicable frequency]

See Attachment 1 to this SOW for a complete description of the Services, Deliverables and/or other tasks to be accomplished, the milestone or implementation schedule, the charges and/or rates applicable to this SOW and any other mutually agreeable information.

**[INSERT NAME OF AMERICAN EXPRESS
ENTITY]**

[INSERT SUPPLIER'S NAME]

By: (GSM representative to sign)_____

By: (Supplier to sign)_____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

ATTACHMENT 1 (to Form SOW)

DETAILED DESCRIPTION OF SERVICES:

DETAILED DESCRIPTION OF DELIVERABLES AND APPLICABLE DELIVERY DATES: (IF APPLICABLE FOR TIME & MATERIALS (T&M) REQUIRED FOR FIRM FIXED PRICE (FFP))

COSTS/FEES/CHARGES - NOT TO EXCEED AMOUNTS AND TOTAL AMOUNTS INCLUDING OUT OF POCKET EXPENSES AND ALL REIMBURSABLE EXPENSES APPROVED BY AMEXCO: [Total Not-to-Exceed SOW Value]:

WRITTEN STATUS REPORTS, IF APPLICABLE:

SERVICE LEVELS, IF APPLICABLE:

TIMEFRAME OF PROJECT/TERM OF SOW (Period of Performance):

Start Date:

End Date:

PERSONNEL LISTING (IF APPLICABLE AND IF POSSIBLE TO PROVIDE):

SUBCONTRACTORS APPROVED BY AMEXCO, SUBCONTRACTED SERVICES/DELIVERABLES AND SUBCONTRACTOR LOCATIONS: Yes ___ No: ___

MAINTENANCE OF HARDWARE/SOFTWARE, IF APPLICABLE:

SHARED USE OF FACILITIES-CONFIDENTIALITY AND INTEGRITY REQUIREMENTS, IF APPLICABLE:

CUSTOMER COMPLAINT INQUIRY HANDLING, IF APPLICABLE

ANY OTHER TERMS AND CONDITIONS MUTUALLY AGREED UPON BY THE PARTIES:

ACCESS TO DATA:

Will Supplier have access to AXP Data? Yes, using AXP Laptops

[OPTION 1:] TIME AND MATERIALS: Amexco shall pay Supplier for its performance under this SOW per the resource/role categories and rate below (if any Services are provided under this SOW by resource/roles not listed below the fees shall be charged per Supplier's rate card elsewhere incorporated into the Agreement):

Line#	Resource/Role	Start Date	End Date	Resource Location	Rate/Hr.	Total Hours	Total Spend
1.							
2.							

SOW NOT TO EXCEED VALUE.

Total fees and expenses under this SOW shall be:

Total Not-to-Exceed Labor Cost: \$00.00

Labor Cost: The lesser of the “Total Not-to-Exceed Labor Cost” or the total number of hours incurred times the Rate/Hr.

Travel & Expense (capped at 4% of Labor Cost*): \$00.00

Total Not-to-Exceed SOW Value: \$00.00

***Total Travel & Expense Reimbursements cannot exceed 4% of Labor Cost.**

[OPTION 2:] FIRM FIXED PRICE: Amexco shall pay Supplier a firm, fixed price for Supplier’s performance under this SOW as follows:

Payment Number	Billing Milestones	Payment Details	Amount to Be Charged
1.			
2.			

FIRM FIXED PRICE RESOURCE UTILIZATION AND APPLIED HOURLY RATE: Every Statement of Work, including those for fixed fee engagements, must include anticipated resource utilization requirements and the applied hourly rates.

Line#	Resource/Role	Rate/Hr.	Total Hours
1.			
2.			

SOW FIRM FIXED PRICE VALUE:

Total fees and expenses under this SOW shall be:

Labor Cost: \$00.00

Travel & Expense (capped at 4% of Labor Cost*): \$00.00*

Total Not-to-Exceed SOW Value: \$00.00

***Total Travel & Expense Reimbursements cannot exceed 4% of Labor Cost.**

Suppliers who travel on behalf of AXP are required to read, acknowledge, and abide by the [American Express Non-Employee Travel and Expense Policy](https://thesquare.americanexpress.com/redir/126818) which outlines the terms and conditions defined for a non-employee engagement with AXP. This policy appears at this domain (or as updated by AXP from time to time): <https://thesquare.americanexpress.com/redir/126818>