

### STATEMENT OF WORK (SOW)

Wisconsin Department of Employee Trust Funds (ETF)  
and  
Groves Advisors, LLC, dba Talent Growth Partners (Contractor)  
**SOW #4**

**Date:** 11/22/2021

**RFP and Contract #:** ETJ0057 for Competency Based Performance Management Services

**Background:** Contract ETJ0057 for Competency Based Performance Management Services between ETF and Contractor was executed on October 9, 2020. Per the terms of the Contract, Section 1.10 of the RFP, statements of work must be drafted and agreed to by ETF and Contractor prior to work commencing. SOW #1 was signed by the parties on November 11, 2020; SOW #2 was signed by the parties on February 4, 2021; SOW #3 was signed by the parties on May 18, 2021.

**Services/Pricing:** The purpose of this SOW #4 is to add the following Services to the Contract:

**Phase 4:** Agency-Wide Readiness. Cost: \$223,750

**Phase 5:** Agency-Wide Implementation. Cost \$151,250

The Services covered under this SOW #4 are described in the attached document, "SOW #4 Detail."

**Total cost for the Services described above:** \$375,000.

**Billing/Invoicing:** Contractor may invoice ETF for Phase 4 and Phase 5 Services on a monthly basis after Services have been completed. Payment terms are outlined in the Contract.

#### AGREEMENT AND AUTHORIZATION:

**Wisconsin Department of Employee Trust Funds**

DocuSigned by:  
By Pamela S Henning  
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Name: Pamela S. Henning

Title: Assistant Deputy Secretary

11/30/2021  
Date: \_\_\_\_\_

**Groves Advisors, LLC, dba Talent Growth Partners**

DocuSigned by:  
By Maria Groves  
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Name: Maria Nicholas-Groves

Title: CEO

11/30/2021  
Date: \_\_\_\_\_

<b>Talent Growth Partners (TGP) - Wisconsin Department of Employee Trust Funds (ETF) Competency-Based Management Project (Contract #ETJ0057) Phases 4 and 5 SOW #4 Detail</b>	
11/22/2021	
<b>Phase 4 - Agency-Wide Readiness</b>	<b>TGP Hours</b>
Internal Systems Set Up and Updating (Trello, excel, polling, survey process)	12
Align on Scope, Milestones, Process; update roadmap	15
Discuss Timelines and Develop Statement of Work	12
Discuss and Document Team Charter	5
Project Meetings	90
Identify and Document the Job Families (up to 15)	5
Review IT's Current State/Work on Competencies	12
Pre-Discovery Meeting with IT Stakeholders	2
Examine/Prep IT/IS Job Family Success Profiles from Korn Ferry Talent Hub	10
As needed, conduct IT/IS Research outside Korn Ferry Talent Hub data	10
Identify Top 10 Competencies for IT/IS	10
Adjust Competencies With Project Team	1
Create Initial Work Group Communications (Purpose, Education, Role of Groups - ETF designs and delivers; TGP	20
TGP Building Initial Communications for IT/IS Work Group	15
Build IT/IS Session Deck & Polling	16
Prep Pre-Read Documentation	9
Build Relevance Rating Exercise	12
Hold Session I with IT/IS with ETF staff co-facilitation/shadowing of process	3
Conduct IT/IS Post Session Analysis & Debrief	10
Design Recommendation Assessment; Compile results for IT/IS	7
Gain Approvals from Senior Management Representative 1-page overview	10
Prep SC Briefing	20
Review IT Process and Make Adjustments	12
TGP consults with ETF HR rep to gather representative position titles and duties for job families; TGP Researches Top 10 Competencies for each of the 14 remaining Job Families using Korn Ferry Talent Hub and outside resources, as necessary. Share Top 10 competencies results with ETF, coupled with ranking exercise document for each job family and develops pre-read materials. ETF uses results to socialize with key stakeholders, and customize deck prep and polling for each Functional Job Family work group process. ETF can utilize the deck TGP prepared for IS/IT to build from. ETF hosts the work group virtual sessions and manages the recommendation assessment through approval	135
Repeat Functional Competency building with 14 other job families (TGP designs functional competency development playbook/tools. ETF customizes these tools and leads remaining 14 job families)	217
Agency-wide Trainings and Communication Efforts /Change Journey	50
SMART Goal Development Training for Leaders (ETF designs & delivers; TGP reviews/consults)	15
Launch Goal Setting Module Technical Training for Leaders (ETF designs & delivers)	0
Agency-wide Trainings on Empowerment & Accountability (ETF designs & delivers; TGP reviews/consults)	20
Assess Adoption and Gather User Goal Setting Feedback (TGP reviews Cornerstone on Demand system generated reports; TGP designs user survey, compiles and assesses results)	15
Contingency for Functional Competency Development Activities	125
<b>Phase 4 - Agency-Wide Readiness Total Hours</b>	<b>895</b>
<b>Phase 4 - Budget Total</b>	<b>\$223,750</b>

<b>Phase 5 Agency-Wide Implementation</b>	<b>TGP Hours</b>
Internal Systems Set Up and Updating (Trello, excel, polling, survey process)	13
Align on Scope, Milestones, Process; update roadmap	13
Discuss Timelines and Develop Statement of Work	13
Discuss and Document Team Charter	9
Communication Reoccurring Weekly/Monthly Cadence	93
Agency-wide Trainings and Communication Efforts /Change Journey	52
Provide Agency Wide Training on Competency Based Management (ETF and TGP co designes, ETF delivers)	72
Launch Cornerstone On Demand Performance Review & Check In Modules (ETF Develops/TGP Can Review)	22
Assess Level of Adoption & Gather Feedback	23
Assess Uniformity and Evaluate Performance Distribution (requires system generated reports from Cornerstone on Demand)	46
Collect & Analyze Agency Wide Performance Data & Determine Gaps & Offer Recommendations (requires system generated reports from Cornerstone on Demand)	63
Curate and Deploy Learning & Development Competency Playlists (ETF Develops/TGP can Review)	23
Recommend Governance Framework to Sustain Value	23
Consult on Competency Based Performance Management Future Phase Gates: Individual Development Plans, Career	62
Contingency for Analysis and Assessment Activities	80
<b>Phase 5 - Agency -Wide Implementation Total Hours</b>	<b>605</b>
<b>Phase 5 - Budget Total</b>	<b>\$151,250</b>
<b>Total Budget to Project Completion (Phases 4 &amp; 5) @ \$250/hour</b>	<b>\$375,000</b>
<b>Project Assumptions</b>	
<ul style="list-style-type: none"> <li>- ETF will renew its license to the Korn Ferry Talent Hub</li> <li>- No More than the 15 job families will be used</li> <li>- ETF will provide a polling tool</li> <li>- Cornerstone On Demand reports will be developed by ETF and shared with TGP (if allowed) for analysis</li> <li>- TGP-led trainings and sessions will be facilitated virtually</li> <li>- ETF is responsible for all technical trainings (Cornerstone On Demand, playlist development, module rollouts)</li> <li>- ETF and TGP consultants will have bi-weekly team meetings</li> </ul>	
<b>Outside of Project Scope</b>	
<ul style="list-style-type: none"> <li>- Cornerstone On Demand technical training or training development</li> <li>- Configuration of Cornerstone On Demand technical customizations</li> <li>- Implementation of other phase gates (beyond Phases 4 and 5)</li> </ul>	