

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**



**ITEM:** 3.5  
(ID # 29809)

**MEETING DATE:**

Tuesday, February 03, 2026

**FROM :** HUMAN RESOURCES

**SUBJECT:** HUMAN RESOURCES: Approve Order Form Number Q-121031 with Cornerstone OnDemand, Inc. for Talent Development and Learning Management Software as a Service Subscription without seeking competitive bid from July 1, 2026, through June 30, 2031, for a total aggregate amount not to exceed \$1,455,688, All Districts. [Total Cost \$1,455,688; plus up to \$200,000 in additional compensation, 100% Core HR Services GSS]

**RECOMMENDED MOTION:** That the Board of Supervisors:

1. Approve the Order Form Number Q-121031 with Cornerstone OnDemand, Inc. for Talent Development and Learning Management Software as a Service Subscription without seeking competitive bid from July 1, 2026 through June 30, 2031 for a total aggregate amount not to exceed \$1,455,688; authorize the chair of the Board to sign the Order Form on behalf of the County;
2. Authorize the Purchasing Agent, in accordance with Ordinance No. 459, based on the availability of fiscal funding and as approved to form by County Counsel to: (a) sign the amendments that stays within the intent of the order form; and (b) sign amendments to the compensation provisions that do not exceed a total aggregate amount of \$200,000 through June 30, 2031;
3. Direct the Purchasing Agent, or designee, to issue a Purchase Order for good and/or services rendered not to exceed the Board approved total aggregate amount; and
4. Direct the Clerk of the Board to retain one (1) copy of the Order Form and return two (2) copies of each to HR for distribution.

**ACTION:**

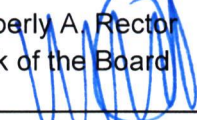
*Tami Douglas-Schatz*  
Tami Douglas-Schatz, Director of Human Resources 1/23/2026

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**MINUTES OF THE BOARD OF SUPERVISORS**

On motion of Supervisor Washington, seconded by Supervisor Gutierrez and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Medina, Spiegel, Washington, Perez, and Gutierrez  
Nays: None  
Absent: None  
Date: February 3, 2026  
xc: HR

Kimberly A. Rector  
Clerk of the Board  
By:   
Deputy

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<b>FINANCIAL DATA</b>	<b>Current Fiscal Year:</b>	<b>Next Fiscal Year:</b>	<b>Total Cost:</b>	<b>Ongoing Cost</b>
<b>COST</b>	\$ 276,940	\$ 283,864	\$ 1,455,688	\$ 0
<b>NET COUNTY COST</b>	\$ 0	\$ 0	\$ 0	\$ 0
<b>SOURCE OF FUNDS: 100% Core HR Services GSS Rate</b>			<b>Budget Adjustment: No</b>	
			<b>For Fiscal Year: 26/27-30/31</b>	

**C.E.O. RECOMMENDATION:** Approve

**BACKGROUND:**

Prev. Agn. Ref.: 08/23/16 (3.47); 08/27/19 (3.16); 07/30/24 (3.45)

**Summary**

The Human Resources (HR) Department is seeking to upgrade Riverside County’s enterprise Talent Management System (TMS) without seeking competitive bids from Cornerstone SumTotal to Cornerstone Galaxy TMS. The HR TMS supports Countywide training, learning and development, and performance management operations. The TMS ensures proper administration and recordkeeping of legally mandated and policy-driven training throughout Departments and is considered a critical system. The vendor, Cornerstone, has scheduled the SumTotal system to sunset on December 31, 2027, after which the County will no longer receive system support or upgrades. Continuing our partnership with Cornerstone using their flagship platform allows the County to maintain full data continuity with minimal user disruption. Because Cornerstone already supports our existing SumTotal platform, they have a deep understanding of Riverside County’s data structure and system integrations, enabling a faster and lower-risk transition to Galaxy. Cornerstone has offered significant discounts to ease this transition, which include add-on connectors that provide additional functionality at no cost, and providing migration and implementation assistance at no additional cost. The attached Sole Source Justification provides key operational benefits to transition to Cornerstone Galaxy.

SumTotal, formerly a subsidiary of Skillsoft and now wholly owned by Cornerstone, has been in use by the County since February 2017. In August 2019, the SumTotal LMS term was extended through June 30, 2023. In June 2021, the Purchasing Department released RFP #HRARC-083 for a countywide Employee Performance Management system. SumTotal won the bid and responded by upgrading existing LMS licenses to Talent licenses, including learning and performance modules at no additional license cost, aside from an implementation fee over two years and \$24,000 in annual maintenance and support, approved under purchasing authority.

Since implementation, the Talent Management System has significantly increased countywide compliance with legally required and Board-mandated training, including employee safety, ethics, and information security. The following modules and data will be transitioned from SumTotal to Galaxy: Learn (training and development management), Talent (performance and Goal Management), Compensation (PRP process Management) and succession planning (identify and develop high-potential employees and proactively manage vacancies in critical leadership and specialized roles). Currently SumTotal, is our enterprise platform used by all County Departments and we will see the same if not more benefits through the implementation of Galaxy. The

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proposed Galaxy TMS would also support the delivery and tracking of compliance training for community-based organizations as part of the RivCoOne initiative.

**Impact on Residents and Businesses**

There is no negative impact on residents and businesses within the County. The implementation of the Cornerstone Galaxy platform ensures the County workforce remains compliant, highly skilled, and responsive to public needs, translating directly into improved community services. The platform's AI-driven learning and proactive compliance features guarantee that all County personnel, including those in critical public-facing and regulatory roles, maintain up-to-date mandated trainings, certifications and specialized knowledge. This manifests in a highly competent workforce, reducing errors, increasing compliance, and accelerating response times for residents seeking essential services, ultimately building greater public trust in County operations.

**Additional Fiscal Information**

The integrated system provides a single, auditable record of workforce proficiency and development needs. This operational efficiency ensures the responsible stewardship of taxpayer dollars.

The following table shows the full costs of the current item before the Board:

Description	Cost	Period of Performance	Year
Cornerstone Package (Galaxy) A unified talent management and workforce agility platform that integrates learning, performance, compliance, and skills intelligence into a single solution.	\$276,940	July 2026-June 2027	1
Cornerstone Package (Galaxy) A unified talent management and workforce agility platform that integrates learning, performance, compliance, and skills intelligence into a single solution.	\$283,864	July 2027-June 2028	2
Cornerstone Package (Galaxy) A unified talent management and workforce agility platform that integrates learning, performance, compliance, and skills intelligence into a single solution.	\$290,960	July 2028-June 2029	3
Cornerstone Package (Galaxy) A unified talent management and workforce agility platform that integrates learning, performance, compliance, and skills intelligence into a single solution.	\$298,234	July 2029-June 2030	4
Cornerstone Package (Galaxy) A unified talent management and workforce agility platform that integrates learning, performance, compliance, and skills intelligence into a single solution.	\$305,690	July 2030-June 2031	5
<b>Total Cost</b>	<b>\$1,455,688</b>		

**Contract History and Price Reasonableness**

In fiscal year 2015, HR conducted a competitive bid process that was awarded and approved by the Board on January 6, 2015 (Item 3-24) to obtain a library of online courses with limited licensing from

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Skillsoft Corporation. On August 23, 2016 (Item 3-47) the Board approved Order Form for the licensing and support to utilize Skillsoft's SumTotal Learning Management System (LMS). In August 27, 2019 (Item 3-16) was approved by the Board to extend the agreement's period of performance for an additional four (4) years through June 30,2023. This was an Amendment to the master agreement to replace the County's outdated system (GeoMetrix Training Partner LMS) with Skillsoft's SumTotal cloud-based LMS in order to support legally required and Board-mandated training, required training for the EPIC system at RUHS, and employee learning county-wide.

Cornerstone offered the upgraded Galaxy platform with significant discounts which include add-on connectors that provide additional functionality at no cost to the County. Cornerstone will provide migration and implementation assistance at no additional cost to the County as stated in the order form Number Q-121031. Procurement was conducted using SSJ #26-110 for Cornerstone OnDemand, Inc. to provide the upgraded Galaxy platform without competitive bidding, for the term of July 1, 2026 through June 30, 2031.

**ATTACHMENTS:**

ATTACHMENT I Order Form Q-121031 with Cornerstone OnDemand, Inc.

ATTACHMENT II Sole Source Justification No. 26-110 for Cornerstone OnDemand, Inc.

 _____ Stacy Orton, Assistant Director of Purchasing	1/27/2026	 _____ Cesar Bernal, PRINCIPAL MGMT ANALYST	1/28/2026
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 _____ Gregg Gu, Chief of Deputy County Counsel	1/27/2026
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Quote Number: Q-121031  
 Order Effective Date: (Date of Last Signature Below)  
 Quote Expiration Date: 02/03/2026

Cornerstone OnDemand - ORDER			
Customer Name	County Of Riverside		
Order Start Date	07/01/2026		
Order End Date	06/30/2031		
Primary Customer Contact	Omar Muhammad	omuhamma@rivco.org	+1 951-358-6279
Customer Address (Ship To)	County Of Riverside,4080 Lemon St Fl 7 ,Riverside, California, United States,92501-3609		
Primary Billing (Invoice) Contact	Omar Muhammad	omuhamma@rivco.org	+1 951-358-6279
Customer Billing (Invoice) Address	County Of Riverside,4080 Lemon St Fl 7 ,Riverside, California, United States,92501-3609		

**Product(s)**

**Period 1**  
7/1/2026 - 6/30/2027

**Period 2**  
7/1/2027 - 6/30/2028

Product	Qty	Fee	Billing Frequency	Qty	Fee	Billing Frequency
Additional Premium ATS Integrations (Basic)	1	USD 0.00	Annual	1	USD 0.00	Annual
Cornerstone Connector Package (Basic)	1	USD 0.00	Annual	1	USD 0.00	Annual
Webhooks Starter (Basic, included)	1	USD 0.00	Annual	1	USD 0.00	Annual
Cornerstone Consulting Services	120	USD 17,000.00	Annual	120	USD 17,425.00	Annual
Cornerstone Extend: Microsoft Teams VILT All Connectors	1	USD 2,500.00	Annual	1	USD 2,562.50	Annual
Cornerstone Extend: Zoom Video VILT All Connectors	1	USD 2,500.00	Annual	1	USD 2,562.50	Annual
Cornerstone Learn Basic (Learning Management + Learning Experience)	37,000	USD 179,000.00	Annual	37,000	USD 183,475.00	Annual
Cornerstone Performance Management + Succession	37,000	USD 42,000.00	Annual	37,000	USD 43,050.00	Annual
Inbound Data Feed - Salary (IDFS) Connector	1	USD 0.00	Annual	1	USD 0.00	Annual
Preferred Customer Success Package	1	USD 33,940.00	Annual	1	USD 34,789.00	Annual
Talent Development SAAS with Audit - Named User	35,000	USD 0.00	Annual			
Web Services with Integration Connector	1	USD 0.00	Annual	1	USD 0.00	Annual
<b>Period Subtotal:</b>		<b>USD 276,940.00</b>			<b>USD 283,864.00</b>	

**Period 3**  
7/1/2028 - 6/30/2029

**Period 4**  
7/1/2029 - 6/30/2030

Product	Qty	Fee	Billing Frequency	Qty	Fee	Billing Frequency
Additional Premium ATS Integrations (Basic)	1	USD 0.00	Annual	1	USD 0.00	Annual
Cornerstone Connector Package (Basic)	1	USD 0.00	Annual	1	USD 0.00	Annual
Webhooks Starter (Basic, included)	1	USD 0.00	Annual	1	USD 0.00	Annual
Cornerstone Consulting Services	120	USD 17,861.00	Annual	120	USD 18,307.00	Annual
Cornerstone Extend: Microsoft Teams VILT All Connectors	1	USD 2,626.56	Annual	1	USD 2,692.23	Annual
Cornerstone Extend: Zoom Video VILT All Connectors	1	USD 2,626.56	Annual	1	USD 2,692.23	Annual
Cornerstone Learn Basic (Learning Management + Learning Experience)	37,000	USD 188,062.00	Annual	37,000	USD 192,763.00	Annual
Cornerstone Performance Management + Succession	37,000	USD 44,126.00	Annual	37,000	USD 45,229.00	Annual
Inbound Data Feed - Salary (IDFS) Connector	1	USD 0.00	Annual	1	USD 0.00	Annual
Preferred Customer Success Package	1	USD 35,658.00	Annual	1	USD 36,550.00	Annual
Web Services with Integration Connector	1	USD 0.00	Annual	1	USD 0.00	Annual
<b>Period Subtotal:</b>		<b>USD 290,960.12</b>			<b>USD 298,233.46</b>	

**Period 5**  
7/1/2030 - 6/30/2031

Product	Qty	Fee	Billing Frequency
Additional Premium ATS Integrations (Basic)	1	USD 0.00	Annual
Cornerstone Connector Package (Basic)	1	USD 0.00	Annual
Webhooks Starter (Basic, included)	1	USD 0.00	Annual
Cornerstone Consulting Services	120	USD 18,765.00	Annual
Cornerstone Extend: Microsoft Teams VILT All Connectors	1	USD 2,759.53	Annual
Cornerstone Extend: Zoom Video VILT All Connectors	1	USD 2,759.53	Annual
Cornerstone Learn Basic (Learning Management + Learning Experience)	37,000	USD 197,583.00	Annual
Cornerstone Performance Management + Succession	37,000	USD 46,360.00	Annual
Inbound Data Feed - Salary (IDFS) Connector	1	USD 0.00	Annual
Preferred Customer Success Package	1	USD 37,463.00	Annual
Web Services with Integration Connector	1	USD 0.00	Annual
<b>Period Subtotal:</b>		<b>USD 305,690.06</b>	

<b>SERVICES (see Statement of Work attached as Exhibit B)</b>		One Time Fee(s) USD 0.00
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**Special Terms**

During the term of this Order, and provided that Customer is not in breach of the Agreement, Customer may purchase additional Users of Cornerstone Learn Basic (Learning Management + Learning Experience) in block of 5000 at an annual cost of USD 36500.00.

As of 07/01/2026, this Order supersedes and replaces all prior subscription purchases, except for Section 4.1 (County Standard Cyber Liability) and Section 4.2 (Non-appropriation) of the order form dated July 1, 2023, which shall remain in effect for the term of the Agreement. If/as applicable, Customer shall receive a prorated credit paid of any subscription fee(s) prepaid from prior orders, which will be applied to Customer's first invoice issued under this Order.

With this Order the Talent Development SAAS with Audit - Name User licenses will be extended, through 6/30/2027. If needed, the parties will negotiate in good faith any extension past 6/30/2027; provided however that no extension will be available past 12/31/2027

## Invoicing Schedule

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Payment terms for this Order shall be Net 30 (days).

Fees are invoiced beginning on the Start Date(s) in accordance with the Billing Frequency. If required, Fees are pro-rated based on the actual number of days in the billing frequency period. One-time fees are invoiced on the Order Start Date. Any usage product will be billed monthly in arrears based on actual usage. Notwithstanding the foregoing, if applicable, one-time fees for services on a SOW shall be invoiced in accordance with the billing terms set out in the applicable SOW. Except as otherwise expressly set forth herein, all purchases are non-cancelable and non-refundable. Fees are exclusive of applicable sales, use, VAT, GST, digital tax, DST and other taxes and are net of withholding taxes

## Product Details

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### Annual Consulting Services Overview

**Service Scope:** During the term outlined in the Order Form, Cornerstone offers remote consulting for the products for which the Customer has valid subscriptions. Services provided include both functional and technical assistance, subject to the number of hours pre-purchased by the Customer. Should the Customer's need exceed these hours, a change order will be needed.

#### Areas of Consulting may include but are not limited to:

- System and application configuration
- Security features
- Navigation setup
- Business process optimization
- Utilization strategies
- Training on application use
- Data integration support
- Content management

#### Areas of Consulting that are excluded from Consulting Services:

- Formal training
- Implementation of newly purchased software

**Availability:** Consulting services are available from 8 AM to 5 PM local consultant time, Monday through Friday, on a first-come-first-served basis. Proactive planning and assignments will ensure support.

**Usage Terms:** Any unused pre-purchased hours will expire at the end of the annual subscription term of the Customer and cannot be carried over. Consulting usage will be billed in 15-minute increments. Overages will be billed as incurred at our then-current rates. Note that project coordination efforts will also count towards the annual hours of the Customer.

**Intended Use:** These services are designed for routine system adjustments and ad hoc support.

**Resource Allocation:** Dedicated resources are not provided, although we will do our best to maintain consistency of resources assigned to the Customer's project; team members are assigned based on their availability and expertise. Travel expenses, if applicable and approved by the Customer, will be billed separately to the Customer according to Cornerstone's standard policies.

#### Preferred Package:

New Functionality Readiness and Adoption – adopt and drive usage of new features

Optimization and Curation – keep your system relevant and easy to use, increase adoption and build competencies

S.O.S. (Sustain Our System) – get help with tasks and on-boarding new admins, and tune up your reports

Education – an efficient way to learn Cornerstone products, features and functions

Customer Success – proactive, strategic guidance and support to make the most of your investment

Technical Support – enhanced support and issue resolution

Customer Community – access self-help tools, connect with peers and stay up to speed on what's new

Product Collaboration and Engagement – have a voice in the future of Cornerstone

See Preferred Customer Success Package for detailed support descriptions, which is attached hereto as Exhibit A and incorporated herein by reference.

#### Cornerstone Performance Management + Succession Includes:

Check-Ins

Development Plans

Competencies/Observation Checklists

Goals

Reviews

Feedback

Engage

Succession

**Connector Package – Basic includes:**

HRIS Integrations  
1 SSO Configuration  
FTP integrations

**Cornerstone Specific:**

Extend Import User/OU Loads  
Basic ATS Integrations  
5 Premium ATS Integrations  
Google Tag Manager  
1 DomainKeys Identified Mail

Included connectors are necessarily limited by the other products being purchased. For example, ATS Connectors will only be available for customers who have purchased Cornerstone ATS, Learning Experience Connectors are only available for customers who have purchased Cornerstone Learning Experience, and Saba Connectors are only available for customers who have purchased Saba LMS, for example. In some circumstances, Connectors may require separate services implementation in order to use.

**Terms and Conditions**

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This Order together with any Exhibits attached hereto which are hereby incorporated by reference (the "Order") is effective as of July 1, 2026 (the "Effective Date") by and between Cornerstone OnDemand, Inc., a Delaware corporation and successor in interest to SumTotal Systems LLC, ("Cornerstone") and the County of Riverside, a political subdivision of the State of California ("Customer" or "Client"), and is issued in accordance with the terms and conditions and made part of the parties' Termed Master License Agreement dated December 31, 2014, including the additional terms and conditions of order forms or orders dated September 1, 2016, September 1, 2019, July 1, 2023, July 1, 2024 (Quote Number Q-85899), and July 1, 2025 (Quote Number Q-113924) (collectively, "Agreement"). If the term of the Agreement is set to expire prior to the end of the Order Term, the term of the Agreement is hereby extended through June 30, 2031, for the purposes of this Order.

The Preferred Customer Success Package and Service Level Agreement applicable to the Cornerstone products listed above are attached hereto as Exhibit A, which is incorporated herein by reference. Specific package features may be subject to change or enhancement over time by Cornerstone, provided that Customer receives at least 60 days' advance written notice from Cornerstone, and the overall support will remain at least substantially equivalent. Any failure by Cornerstone to maintain such overall support at a level that is at least substantially equivalent as the current level of support shall constitute a material breach pursuant to Section 3.2 of the Agreement. Notwithstanding anything to the contrary in Exhibit A and irrespective of any service credits issued, subject to force majeure and Software maintenance periods, should: (i) the Software availability in any three (3) out of six (6) months in a 6 month rolling period fall below 97%; or (ii) Cornerstone fails, in a given calendar month, to timely resolve four (4) separate Severity 1 defects and/or seven (7) separate Severity 2 defects in accordance with the Service Level Agreement, Customer may terminate the Agreement, as its sole and exclusive remedy in addition to any service credits, upon payment to Cornerstone of any amounts owed through the date of termination.

The Statement of Work is attached hereto as Exhibit B, which is incorporated herein by reference.

The Agreement is amended by adding new Section 2.10: "Use Restrictions. The Software and Services may be used only for Customer, its Affiliates, and by Customer's contractors, service providers, or other third parties, as determined and authorized by Customer from time to time, for the lawful business purposes of Customer and such entities. Customer shall not: (a) use or deploy the Software in violation of applicable laws or this Agreement; (b) store, process, publish or transmit any threatening, infringing or offensive material, or material that constitutes a security risk or a violation of any party's privacy, intellectual property or other rights; (c) if Customer has any operations or users in the United States, upload any Protected Health Information subject to the Health Insurance Portability and Accountability Act ("HIPAA") to the Software; (d) resell any Software or Services or operate a service bureau, outsource, rent, sublicense or use in a time-sharing capacity except as expressly permitted by Cornerstone; (e) create any derivative works based upon the Software; (f) reverse engineer, reverse assemble, decompile or otherwise attempt to derive source code from the Software or any part thereof (except to the extent that such restriction is not permitted under applicable law); (g) upload any data not required to use the Software as generally intended; (h) make any Software or Services available to any unauthorized parties; (i) perform penetration or similar tests (for example, network discovery, port and service identification, vulnerability scanning, password cracking or remote access testing) on the Software or Services; or (j) publicly release the results of benchmark tests or other comparisons of any Software or Services with other software, services, or materials, except as required by applicable law or regulation. In the event of a breach of any of the foregoing prohibitions, Cornerstone reserves the right to suspend access to the Software, to the extent and for so long as reasonably necessary, to prevent harm to Cornerstone, Customer, other customers, and/or Cornerstone's partners, vendors and suppliers with such notice as may be reasonable in the context of the prospective harm. Customer represents that it has the legal right to provide Cornerstone with access to Customer Data as required for Cornerstone to perform its obligations under this Agreement. Upon expiration or termination of this Agreement, Customer shall cease using all Software and Services. Customer may retrieve Customer Data any time during the term of the Agreement. If requested, at a scope and price to be agreed, Cornerstone will assist with such data retrieval.

The Agreement is amended by adding new Section 10 as follows: "Statistical Data. Subject to the confidentiality rights and intellectual property rights protections set forth in this Agreement, Cornerstone has the perpetual right to use aggregated, anonymized, statistical data ("Statistical Data") derived from the operation of the Software, solely for Cornerstone's internal business purposes, including product optimization and to improve Customer's experience, provided that Cornerstone does not share any Statistical Data with any third party."

The Agreement is amended by adding new Section 11 as follows: "Suggestions. To the extent allowed under applicable law or regulation, Cornerstone shall have a royalty-free, worldwide, perpetual, irrevocable license to use or incorporate into the Software and Services any suggestions, ideas, enhancement requests, feedback, or recommendations provided by Customer relating to the operation of the Software and Services, provided such information does not include Customer's confidential information." Notwithstanding anything to the contrary in the Agreement, Cornerstone's SLA and Support package, attached hereto as Exhibit A and incorporated herein by reference, will apply to the products and services listed on this Order.

Each Party to this Order agrees to the use of electronic signatures, such as digital signatures that meet the requirements of the California Uniform Electronic Transactions Act ("CUETA") Cal. Civ. Code §§ 1633.1 to 1633.17, for executing this Order. The Parties further agree that the electronic signatures of the Parties included in this Order are intended to authenticate this writing and to have the same force and effect as manual signatures.

The Parties hereto have caused their duly authorized representatives to execute this Order.

**Agreed and accepted:**

By way of the initials, below, Customer's signatory confirms that they are knowledgeable about the Purchase Order process of Customer, and Customer hereby confirms that:

**(Please select from the below options, and initial where indicated)**

**Customer will be sending a Purchase Order for this order (Yes/No): Yes**

If a Purchase Order will be sent, the number of such Purchase Order is: \_\_\_\_\_ . If the Purchase Order number is not available at the time of signature, Customer agrees to provide same to Collections@finance.csod.com within seven (7) calendar days of the Order Effective Date. Following notice and a reasonable time to cure, Services are subject to suspension for failure to timely provide such Purchase Order. For the avoidance of doubt, Cornerstone does not require the Purchase Order to issue an invoice and may issue an invoice without waiting for the Purchase Order in the event of a delay. Regardless if a PO is required or not, Customer agrees to pay all invoices associated with this Order in accordance with the payment terms hereof.

Initial: KS

Please note that Cornerstone may, at its sole discretion, elect to not process this Order if Customer does not provide the above information.

Customer		Cornerstone OnDemand, Inc.	
Signature :	<i>Karen S. Spiegel</i>	Signature :	DocuSigned by: <i>Jared Bogert</i> CE9AD7BF41C6455...
Name:	Karen Spiegel	Name:	Jared Bogert
Title:	Chair, Board of Supervisors	Title:	GVP, Sales
Date:	FEB 03 2026	Date:	January 27, 2026

ATTEST:  
Kimberly A. Redon  
Clerk of the Board

By: KS  
Deputy

APPROVED AS TO FORM:  
County Counsel  
Minh C. Tran

*Tawny Lieu*

By: \_\_\_\_\_  
Tawny Lieu  
Supervising Deputy County Counsel

01/27/2026  
Dated: \_\_\_\_\_

Order Validation  
Signed by:  
*Order Validation*  
F178D2B02F8F4A2...



## Exhibit A

### Preferred Customer Success Package

Clients with the Preferred Customer Success Package will enjoy the following support benefits<sup>1</sup>:

1. **Application Functionality:** General guidance intended to ensure the effective use of the Cornerstone application.
2. **Application Issue Management:** Analysis, tracking, communication and resolution of production-related application issues.
3. **Service Request Management:** Ability to manage the scoping, tracking and delivery of requests for standard engineering services.
4. **24/7 access to our Knowledge Base and Cornerstone Success Center:** Around-the-clock access to self-service resources such as the online Knowledge Base and our customer community in the Cornerstone Success Center, where they can self-serve or seek best-practice advice from Cornerstone Subject Matter Experts and peer organizations.

The Preferred Customer Success Package offers the following support features:

Support Feature	Description
Live Phone Support	Available 24/7/365 to administrators that maintain their training certifications
Support Case Handling	Cases reviewed by senior specialists across all product suite pods

<sup>1</sup> Specific package features may be subject to change or enhancement over time, though overall support will remain at least substantially equivalent.

Support Performance Scorecard KPIs	Customized scorecard published quarterly and available for customer review and discussion
Named Lead Administrators	Up to 6 individual administrators who may contact Cornerstone Global Product Support
Online Support and Knowledge Base	Access to Cornerstone's self-service resources is available 24/7 through the web interface within the Cornerstone application
Case Management Tools	Included, via 24/7 self-service portal
Cornerstone Success Center Community	Included, via 24/7 self-service portal
Service levels	See Cornerstone's Service Level Agreement

## **SERVICE LEVEL AGREEMENT (STANDARD)**

This Service Level Agreement is subject to the terms and conditions of this Order and does not become operative until Client has signed off on Implementation, training is completed for all products purchased, and Client's portal is live on Cornerstone's production environment. For clarity, this Service Level Agreement applies only to "live" portals.

## DEFECTS

A "Defect" is a technical defect with the Cornerstone application and/or those portions of software integrations within Cornerstone's control. Defects fall into two general categories: major (Severity 1 and Severity 2) and minor (Severity 3). The "Severity" of a Defect is determined by Cornerstone, subject to the following definitions and parameters.

### Major Defects

- Severity 1 (S1):** A Defect that results in at least one of the following: (i) the Cornerstone URL produces no results, or (ii) Client's authorized users cannot log in to Cornerstone's application after repeated attempts. "Severity 1" does not include downtime for maintenance.
- Severity 2 (S2):** A Defect that results in any of the following: (i) an entire application module (e.g., Learning Cloud, Performance Cloud, Extended Enterprise Cloud, etc.) is inaccessible; (ii) no course is being delivered; (iii) no queue will process any transactions; (iv) no report within the application produces any data or the data has not been refreshed in fewer than twenty-four (24) hours; or (v) no tasks will launch.

	S1	S2
<b>Initial Notification</b>	One (1) hour via an Incident Report	
<b>Status Updates</b>	Every two (2) hours until resolution or as indicated in the Incident Report	
<b>Resolution</b>	Twelve (12) hours	Twenty-four (24) hours
<b>Remedy</b>	In the event that Cornerstone has not complied with its "Resolution" obligations set forth above, then, for each calendar day (or portion thereof) that Cornerstone has not so complied, Client shall be entitled, as its sole and exclusive remedy therefor,	

	to a credit against Client's next invoice equal to 1/365th of the annual fees for the affected Software set forth in the Order.
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### Minor Defects

- **Severity 3 (S3):** A Defect in one or more application features.

For "Severity 3" Defects, Client determines its priority in having the Defect resolved (i.e., Priority 1 (P1), Priority 2 (P2), or Priority 3 (P3)). Any issue not clearly labeled "Priority 1" or "Priority 2" by Client at the time of initial submission will be deemed a "Priority 3" issue.

As a guideline, below are some examples of the three priority levels:

- **Priority 1** = A prominent feature I routinely use that is important to my business, where multiple users are prevented from progressing with important tasks. There is no work-around. "I get mad whenever I think about it not working." *An example: The submit button on a task is greyed out and a user cannot submit a performance review.*
- **Priority 2** = A feature that is annoying when it doesn't work, but multiple users are not prevented from progressing with important tasks. A work-around exists. "I get annoyed but can deal with it not working." *An example: Users' transcripts do not accurately reflect course completions. A temporary work-around is available via Cornerstone manually running reports for the client to access this data.*
- **Priority 3** = A feature issue that is neither Priority 1 nor Priority 2, including without limitation, cosmetic issues with the application. "I can deal with it." *An example: An image is scaled too large on certain printed transcripts.*

	S3/P1	S3/P2	S3/P3
<b>Case Generation</b>	Upon submission		
<b>Status Updates</b>	Available 24/7 via self-service portal.		

<b>Resolution</b>	Thirty (30) business days	Sixty (60) business days	Within a reasonable time period
<b>Remedy</b>	In the event that Cornerstone has not complied with its "Resolution" obligations for S3/P1 and S3/P2 set forth above, then Client shall give Cornerstone prompt, written notice of such non-compliance. If, after five (5) business days from receipt of such notice of non-compliance, Cornerstone still has not resolved the problem, then Client shall be entitled, as its sole and exclusive remedy therefor, to a one-time credit against Client's next invoice equal to 1/365th of the annual fees for Software set forth in the Order.		N/A

## UPGRADE/DOWNGRADE OF PRIORITY LEVEL

If, during the case submission process, Cornerstone reasonably determines the issue either warrants assignment of a higher priority level than currently assigned or no longer warrants the priority level currently assigned based on its current impact on the production operation of application, then the priority level will be upgraded or downgraded accordingly to the priority level that most appropriately reflects its current impact.

## GENERAL QUERIES

Cornerstone endeavors to respond to all general queries about the application within one (1) business day.

## OFFLINE PLAYER SUPPORT

For Offline Player, Cornerstone support is limited to **troubleshooting one model PC in the client's environment that meets the minimum technical requirements specified by Cornerstone** (available in the Cornerstone Success Center). It is the responsibility of the primary administrator to ensure all other machines in their environment conform to the model PC requirements. Should the client desire troubleshooting assistance with issues other than on the model PC, Cornerstone may be available to provide support services for an additional fee.

Cornerstone will periodically release new versions of Offline Player. Accordingly, technical support will be available for the then-current version and immediately prior version only. In addition, if a code change is required to resolve the issue, the client may be required to upgrade to the then-current version of Offline Player. The primary administrator is responsible for ensuring that the Offline Player is kept up-to-date, including applying available software updates.

The client agrees to provide WebEx access (or other means of remote diagnostics) to the model PC upon request to aid troubleshoot efforts.

## **SOFTWARE AVAILABILITY**

Cornerstone will provide at least 99.5% availability per calendar month to Software (excluding reasonable and scheduled maintenance periods, which usually occur at or after 5:30pm US Pacific Standard Time on Fridays). In the event that Cornerstone has not complied with this Software availability obligation, then, for each 0.3% (or portion thereof) of availability below 99.5%, Client will be entitled, as its sole and exclusive remedy therefor, to a credit against Client's next invoice equal to 1/365th of the annual fees for Software set forth in the Order.

To claim a credit, Client must submit a credit request within thirty (30) days of the event giving rise to a credit. Upon receiving the request, Cornerstone shall have five (5) business days to respond.

## EXHIBIT B - STATEMENT OF WORK

### PURPOSE

The purpose of this Statement of Work is to describe the scope and deliverables for the implementation of the Cornerstone product implementation.

The activities performed during implementation are assumed to be a “co-build” model wherein implementation consultant, will facilitate the Client through the implementation process, and the Client will perform the required configuration and build activities in all in-scope instances. Configuration and integration activities will be done in Client lower environment first and then moved to Production upon successful testing. In this approach, the Client will be responsible for replicating any configuration and build activities into their Production environment.

### ESTIMATED TIMELINE

The table below provides estimated timeframes for each project phase. These durations are approximate and may vary based on Client requirements. Phases may overlap, and timelines may shift depending on the Client’s internal processes. The overall project lifecycle is estimated at 10 to 20 weeks, followed by an additional 2 to 4 weeks of hypercare after each module launch. This timeline may repeat for each additional module. Please note that estimated phase durations may extend with the purchase of Advisory Service engagements.

Phase	Estimated Duration	Cornerstone Resources <i>project dependent</i>	Client Resources
<b>Plan</b>	1 Week	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>
<b>Advise</b>	2 - 5 Weeks (5 Weeks with Advisory Services)	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>
<b>Design</b>	4 - 8 Weeks	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>
<b>UAT</b>	2 - 4 Weeks	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>
<b>Launch</b>	1 Week	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>
<b>Hypercare</b>	2 - 4 Weeks	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Consultant</li> <li>• Technical Consultant</li> </ul>	<ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Business Process Owners</li> <li>• Technical Resources</li> <li>• System Administrators</li> </ul>

*\* The durations outlined are estimates based on the anticipated scope and requirements. The actual project duration will be mutually agreed upon during the planning phase.*

### IMPLEMENTATION SERVICES

The Scope of Services outlined below provides a detailed breakdown of the key components of the Implementation Services, along with the corresponding deliverables to be provided by both Cornerstone and the Client. These Implementation Services and associated phases will be repeated for each product included in scope.

Phase	Cornerstone Deliverables	Client Deliverables
<p><b>Plan</b></p>	<ul style="list-style-type: none"> <li>• Project initiation call with Client; confirm project scope with Client</li> <li>• Document minimum Go-Live requirements</li> <li>• Provide recommended training</li> <li>• Review expectations, project parameters, targeted validation testing dates, scheduled go-live ready date</li> <li>• Create meeting schedule for project lifecycle</li> <li>• Schedule kickoff meeting</li> <li>• Schedule and lead technical kickoff call(s) when applicable</li> <li>• Complete remote kick-off meeting</li> <li>• Complete remote technical kick-off meeting</li> <li>• Provide Client discovery questionnaire(s)</li> </ul>	<ul style="list-style-type: none"> <li>• Define/Assemble Project Team needed to support implementation</li> <li>• Project Planning &amp; Logistics</li> <li>• Define measures of project success</li> <li>• Confirm meeting schedule</li> <li>• Take online training as needed</li> <li>• Participates in remote kick-off meeting</li> <li>• Attend technical project kickoff calls</li> </ul>
<p><b>Advise</b></p>	<ul style="list-style-type: none"> <li>• Complete Advisory Workshop(s) if in scope</li> <li>• Prepare baseline configuration of the Pilot portal based upon Client response to discovery questionnaire</li> <li>• Deliver technical documentation (data design documents and templates)</li> <li>• Schedule and lead Organizational Unit Workshop</li> <li>• Deliver User Acceptance Testing templates scripts</li> </ul>	<ul style="list-style-type: none"> <li>• Continue recommended administrator training</li> <li>• Complete and return discovery questionnaire</li> <li>• Provide branding and marketing collateral</li> <li>• Provide processes applicable to the current implementation project functionality, including, but not limited to, process maps, supporting forms, approval workflows, external training requirements, use case scenarios, and any additional documentation.</li> <li>• Attend remote sessions</li> <li>• Complete design specifications for technical projects if in scope.</li> </ul>
<p><b>Design</b></p>	<ul style="list-style-type: none"> <li>• Lead design sessions to review and guide Client through application best practices and scenarios</li> <li>• Begin work on integrations as determined in the project plan</li> <li>• Scope of configuration will be limited to the following products based on Client use case and current features and functions:</li> </ul> <p><b>Core</b></p> <ul style="list-style-type: none"> <li>• Review Organization Units and Custom Fields</li> <li>• Review Core preferences, password preferences, display preferences, custom log in page, group preferences, feature activation, security health check and email administration</li> <li>• Configure and Review navigation tabs and links</li> <li>• Review and configure landing page</li> <li>• Review and configure user profile</li> </ul> <p><b>Skills &amp; Capabilities</b></p> <ul style="list-style-type: none"> <li>• Provide overview of Skills</li> <li>• One (1) Capability Model</li> <li>• One (1) Custom Skill</li> <li>• One (1) People Matrix</li> </ul> <p><b>Cornerstone Learn</b></p> <p>Configure Learning Management:</p> <ul style="list-style-type: none"> <li>• One (1) instructor-led training example</li> <li>• One (1) Level 1 evaluation</li> <li>• One (1) curriculum</li> <li>• One (1) material</li> <li>• One (1) video</li> <li>• One (1) standard learning assignment</li> <li>• One (1) dynamic learning assignment</li> <li>• One (1) dynamic recurring learning assignment</li> <li>• One (1) test</li> <li>• One (1) training request form</li> <li>• One (1) approval workflow</li> <li>• One (1) People Matrix with Training</li> <li>• Review Content Uploader</li> </ul>	<ul style="list-style-type: none"> <li>• Complete administrator training as prescribed in the training plan</li> <li>• Attend configuration and design remote sessions</li> <li>• Create customized acceptance test scripts</li> <li>• Complete configuration of remaining features and functions for the following modules, based on outcomes from the design sessions, and finalize setup within the live portal:</li> </ul> <p><b>Core</b></p> <ul style="list-style-type: none"> <li>• Global Configurations – emails triggers, security roles, welcome page/landing page, and general preferences</li> <li>• Language translations, as necessary</li> <li>• Configuration of additional Client security roles</li> </ul> <p><b>Skills &amp; Capabilities</b></p> <ul style="list-style-type: none"> <li>• Configure remaining skills, capabilities, people matrix, and preferences</li> </ul> <p><b>Cornerstone Learn</b></p> <p>Learning Management</p> <ul style="list-style-type: none"> <li>○ Load eLearning course content and materials</li> <li>○ Load all required documents including curriculums, test and evaluations, Instructor Led Training events and sessions, instructors, facilities, and certifications</li> <li>○ Test content launching, tracking, and completion</li> </ul> <p>Learning Experience</p> <ul style="list-style-type: none"> <li>○ Curate training as needed</li> <li>○ Configure all feature functions</li> <li>○ Test content launching, tracking, and completion</li> </ul> <p><b>Certification Module</b></p> <ul style="list-style-type: none"> <li>• Finalize configuration of remaining certifications</li> <li>• Set up email triggers</li> <li>• Configure Certificates</li> <li>• Complete any remaining preferences required to support ongoing certification builds</li> </ul> <p><b>Performance Module</b></p> <ul style="list-style-type: none"> <li>○ Goals <ul style="list-style-type: none"> <li>▪ Create goals</li> </ul> </li> <li>○ Performance Reviews</li> </ul>

<ul style="list-style-type: none"> <li>• Review Course Catalog including but not limited to recurrence, availability, training equivalence, custom approval workflows, custom completions approvals, prerequisites, and training exemptions.</li> <li>• Review learning preferences including but not limited to: Learner Home, External Training, Feature Activation, ILT, Learning Assignment Tool, Training Completion Page and Training Completion Signatures</li> <li>• Review relevant email triggers and email digest</li> </ul> <p><b>Cornerstone Learn</b> Configure Learning Experience:</p> <ul style="list-style-type: none"> <li>• Feature review and set-up:             <ul style="list-style-type: none"> <li>○ Skills Passport</li> <li>○ People Search</li> <li>○ Configurable Discover page</li> <li>○ In-app reporting</li> <li>○ Standard Mobile App</li> <li>○ Leaderboard</li> <li>○ Manager Dashboard</li> <li>○ Badging</li> <li>○ Learning Calendar</li> <li>○ Dynamic Group Management</li> <li>○ Group Based Access Control</li> </ul> </li> <li>• Conduct curation training, configuring sample data in sandbox instance:             <ul style="list-style-type: none"> <li>○ One (1) Group and Channel</li> <li>○ One (1) SmartCard Content</li> <li>○ One (1) Pathway</li> <li>○ One (1) Journey</li> <li>○ One (1) Project Smart Card</li> <li>○ One (1) VILT SmartCard</li> <li>○ One (1) Dynamic Group</li> <li>○ One (1) Skills Assessment</li> </ul> </li> </ul> <p><b>Certification Module</b></p> <ul style="list-style-type: none"> <li>• Platform preferences, email triggers</li> <li>• Review and configure one (1) Certification, fixed date certification, relative certification, and relative with rolling period certification.</li> <li>• Example Families and Categories</li> <li>• Example Certificate</li> <li>• Example Transcript Issues</li> <li>• Example Versioning</li> </ul> <p><b>Performance Module</b></p> <ul style="list-style-type: none"> <li>• Set platform preferences and configure the following:             <ul style="list-style-type: none"> <li>Goals</li> <li>• Create one (1) perspective</li> <li>• Create one (1) category</li> <li>• Create one (1) goal</li> <li>• Create one (1) goal library</li> <li>• Review goal preferences</li> <li>• Review goal configuration</li> <li>Reviews</li> <li>• Review and configure default rating scales</li> <li>• Review and configure the printable performance review</li> <li>• Review and configure performance form sections to accommodate baseline Client use case</li> <li>• Create one (1) standard review task with applicable performance review form sections</li> <li>• Create one (1) off-cycle review task with applicable performance review form sections</li> <li>• Review and discuss the performance review task detail administrator page</li> <li>• Review and configure Feedback Preferences</li> </ul> </li> </ul> <p><b>Check-Ins</b></p> <ul style="list-style-type: none"> <li>• Create one (1) check-in template</li> <li>• Review and discuss check-in settings</li> </ul> <p><b>Development Plans</b></p>	<ul style="list-style-type: none"> <li>▪ Create sections, questions, competencies, competency models rating scales, review tasks, groups</li> <li>○ Check-ins             <ul style="list-style-type: none"> <li>▪ Set check-ins settings, create templates, customize homepage</li> </ul> </li> <li>○ Feedback             <ul style="list-style-type: none"> <li>▪ Configure the universal profile, snapshot, badges</li> <li>▪ Engage</li> <li>▪ Create questions, response scales, surveys, campaigns</li> </ul> </li> <li>○ View             <ul style="list-style-type: none"> <li>▪ Create test data and lists</li> </ul> </li> <li>○ Career Center             <ul style="list-style-type: none"> <li>▪ Create career center preferences and data for resumes, questions, and location bank</li> </ul> </li> </ul> <p><b>Development Plans</b></p> <ul style="list-style-type: none"> <li>○ Create development plan templates, custom fields</li> <li>○ Competency Management</li> <li>○ Create competencies, competency models, rating scales</li> </ul> <p><b>Observation Checklists</b></p> <ul style="list-style-type: none"> <li>○ Create competencies, competency models, rating scales, observation checklists</li> </ul> <p><b>Succession Module</b></p> <ul style="list-style-type: none"> <li>○ Create succession metrics for succession plans, succession templates and tasks</li> </ul> <p><b>Compensation Module</b></p> <ul style="list-style-type: none"> <li>○ Create compensation salary structure, adjustment guidelines, share prices, templates, and tasks</li> </ul>
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	<ul style="list-style-type: none"> <li>Review and configure activity types, objective categories, plan category and custom fields</li> <li>Review and configure development plan preferences</li> <li>Create one (1) development plan template</li> </ul> <p><b>Competency Management</b></p> <ul style="list-style-type: none"> <li>Review and configure one (1) competency</li> <li>Review and configure one (1) competency model</li> <li>Review and configure one (1) competency section and competency assessment, if applicable in performance form sections</li> <li>Review and configure one (1) competency task</li> </ul> <p><b>Observation Checklists</b></p> <ul style="list-style-type: none"> <li>Review and discuss observation checklists. Detail the different use case for ad-hoc, standard, recurring, and checklist as a learning object, if applicable</li> <li>Review and configure one (1) competency</li> <li>Review and configure one (1) competency model</li> <li>Review and configure one (1) observation checklist</li> <li>Review and discuss validating checklist, including detail use case for notes, co-planners, electronic signatures, and validation methods.</li> </ul> <p><b>Succession Module</b></p> <ul style="list-style-type: none"> <li>Review and configure succession metrics to accommodate baseline Client use case</li> <li>Review and configure, one (1) succession assessment template and one (1) job pool template, one (1) task</li> <li>Review and configure Succession preferences</li> <li>Review and support configuration of remaining functional features within the Succession module</li> </ul> <p><b>Compensation Module</b></p> <ul style="list-style-type: none"> <li>Review and configure one (1) compensation salary structure, and one (1) adjustment guideline.</li> <li>Create one (1) standard compensation task</li> <li>Create one (1) off-cycle compensation task</li> <li>Review and configure Compensation preferences</li> </ul>	
<p><b>UAT</b></p>	<ul style="list-style-type: none"> <li>If needed, perform a copy over from Pilot to Stage before the Live to Pilot copy down to preserve existing configurations</li> <li>Execute copy down from Live to Pilot to ensure all configurations are in place prior to the commencement of UAT.</li> <li>Discuss User Acceptance Testing including test scripts and participants</li> <li>Schedule daily User Acceptance Testing touch base calls</li> <li>Solidify configuration with Client in preparation for User Acceptance Testing in pilot</li> <li>Daily User Acceptance Testing touch base to review open testing issues with Client</li> <li>Triage (categorize and prioritize) reported issues and address prior to go-live</li> <li>Support Client during testing and validation</li> <li>Facilitate in scope technical project testing</li> </ul>	<ul style="list-style-type: none"> <li>Attend follow-up remote sessions</li> <li>Attend User Acceptance Testing prep meetings</li> <li>Create and complete user acceptance test scripts</li> <li>Populate specific test data such as tasks and users</li> <li>Create and complete Client-specific testing template</li> <li>Attend all User Acceptance Testing calls</li> <li>Review UAT feedback with Implementation team</li> <li>Make corrections or configuration changes based on UAT findings in Pilot and Live portal</li> <li>Test system interfaces and integrations end-to-end</li> </ul>
<p><b>Execute</b></p>	<ul style="list-style-type: none"> <li>Obtain named care admins from Client</li> <li>Close out any open issues/items for Go Live</li> <li>Client Go-Live</li> <li>Discuss post live survey with Client</li> <li>Schedule and execute final Historical Data Loads</li> </ul>	<ul style="list-style-type: none"> <li>Complete any needed retesting</li> <li>Make corrections or configuration changes in Pilot and Live portal</li> <li>Complete any change management actives to support launch</li> <li>Client Go-Live</li> </ul>
<p><b>Hypercare</b></p>	<ul style="list-style-type: none"> <li>Up to 8 hours of post go live support</li> <li>Reviews project log daily and triages, investigates and identifies resolution path for each item and records in the project log</li> </ul>	<ul style="list-style-type: none"> <li>Records and reports items for review in project log</li> <li>Actively participates in 3 x 30min remote sessions per calendar week (up to 3hrs) to discuss newly report and</li> </ul>

	<ul style="list-style-type: none"> <li>• Conducts 3 x 30min remote sessions per calendar week (up to 3hrs) to discuss newly reported and closed items with Client</li> <li>• Conduct project close out</li> </ul>	<p>closed items with Implementation Consultant and then takes further action as needed</p> <ul style="list-style-type: none"> <li>• Submits any needed cases to Global Client Support</li> </ul>
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**Additional Services**

<b>Consulting – Edge Import</b>
<p><b>Brief Summary</b>                  Cornerstone Extend Import enables customers to manage their data loads in a self-service manner. Cornerstone Extend Import supports the ability to map, validate, and load data into their Cornerstone application using flat files for the following data sets:</p> <ul style="list-style-type: none"> <li>• Capabilities Loads and Feeds</li> <li>• Compensation Loads and Feeds</li> <li>• Employee Loads and Feeds</li> <li>• Group Loads and Feeds</li> <li>• Learning Loads and Feeds</li> <li>• Organizational Unit (OU) Loads and Feeds</li> <li>• Performance Loads and Feeds</li> <li>• Recruiting Loads</li> </ul> <p><b>Tasks</b></p> <ul style="list-style-type: none"> <li>• Cornerstone: Enable Cornerstone Extend Import in client portals</li> <li>• Cornerstone: Lead the client in a design workshop to review the data feed design process and supports the design decision process of the client</li> <li>• Client: Prepares files for load</li> <li>• Cornerstone: Guides client on loading files into the Pilot Portal</li> <li>• Client: Reviews and corrects any errors detected in the load process</li> <li>• Client: Reviews and approves data load on Pilot</li> <li>• Client: Loads data to Live using Cornerstone Extend Import tool</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Utilizes Cornerstone standard Data feed specifications as designed for the Cornerstone Extend Import tool.</li> <li>• Client has the ability to extract and transform source data to the Design Specifications format.</li> <li>• Client has the ability to configure file transfers of data to Cornerstone</li> </ul>

<b>Cornerstone Extend: Marketplace Integration Consulting</b>
<p><b>Brief Summary</b>                  This project represents Consulting Services towards consulting and validation of Cornerstone Extend Marketplace Integration purchased by client.</p> <p>Pre-Requisites</p> <ul style="list-style-type: none"> <li>• Access to Cornerstone application with admin credentials</li> <li>• Access to Vendor credentials required for the integration configuration</li> </ul> <p><b>Tasks</b></p> <ul style="list-style-type: none"> <li>• Cornerstone: Lead the discussion to review integration overview, functional &amp; technical decisions with the client admin</li> <li>• Client: Complete all vendor administrative configuration and enablement steps (if applicable)</li> <li>• Cornerstone: Assist client admin with configuration &amp; enablement steps of the Cornerstone Extend integration in Pilot/Stage instance.</li> <li>• Client: Review and test the integration in Pilot or Stage instance</li> <li>• Cornerstone: Assist client admin with configuration &amp; enablement for integration in Production</li> <li>• Client: Review and signoff on functionality in Production</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>• Vendor account fees and admin privileges are the responsibility of the Client</li> <li>• Vendor account configurations are responsibility of the Client</li> <li>• Cornerstone Extend Integrations are productized and fixed scope integrations which have clearly defined features &amp; functionality designed in mutual agreement with the product Vendor.</li> <li>• The features &amp; functionalities are documented in the Getting Started Guides available within Cornerstone Online Help.</li> </ul>

**Cornerstone Extend: Marketplace Integration Consulting**

- Any requested changes or modifications to Cornerstone Extend Marketplace integrations are subject to the review/discretion of the Cornerstone product development team in conjunction with the Vendor.
- Except where otherwise stated or agreed by the parties, Cornerstone's obligation to perform an Implementation-related Service expires at the earlier of: (i) acceptance of the Service by Client; (ii) if Client does not commence the project, one year from the purchase date; or (iii) if Client commences the project but subsequently does not proceed with the project, six (6) months from the date Client ceased working on the project.

**Email DKIM Setup**

**Brief Summary**

The goal of this project is to set up the clients portal with DKIM Configurations.

**Tasks**

- The client understands and is responsible for DNS configuration of the RSA KEY within their own DNS infrastructure
- The client will identify a single client domain required for DKIM configuration
- The client will provide the single domain for DKIM configuration
- Once the project has started the client must confirm in writing the domain to be used – this must be provided to the CSOD representative assigned to the project
- CSOD Generates DKIM keys – Private and Public – Based on the provided Client Domain and CSOD Selector
- CSOD generates and provides the public key to client (RSA KEY)
- CSOD generates and utilizes the private key for DKIM/SMTP configuration
- Distribute public key to client
- E-mail, FTP, or any secure form of transit
- Client will need to update public DNS with public key
- Create TXT record in their public DNS using public RSA KEY provided by CSOD
- Test DNS propagation
- Validate client side DNS and DKIM public key configurations
- CSOD SMTP configurations
- Validate client DNS configuration and check the status of the Selector record
- Import DKIM private key to internal SMTP servers
- Create customer configuration based on client domain and DKIM requirements
- Client and CSOD Testing:
- Send test e-mails between CSOD and Client e-mail servers for verification purposes

**Assumptions**

- Any change requested subsequent to the approval of the initial SOW design document will require the creation of an additional SOW and follow the standard configuration process. Additional SOW requests are reviewed and can result in additional charges to the Client.
- Except where otherwise stated or agreed by the parties, Cornerstone's obligation to perform an Implementation-related Service expires at the earlier of: (i) acceptance of the Service by Client; (ii) if Client does not commence the project, one year from the purchase date; or (iii) if Client commences the project but subsequently does not proceed with the project, three (3) months from the date Client ceased working on the project.

**Foundational Web Services – Service Delivery Package**

**Brief Summary**

Client has purchased our Foundational Web Services solution. The following outlines the deliverables of the Service Delivery Package required to enable and support interfacing with the following APIs as defined on the Cornerstone Developer Portal (<https://csod.dev/>):

- Core/HR
- Learning
- Performance
- Recruiting
- Connectors

This is the standard offering for clients that require the basic implementation support needed to have client effectively use Web Services. It is intended to get clients up and running with the Web Services basics.

**Tasks**

## Foundational Web Services – Service Delivery Package

- Cornerstone: Conduct Kick-Off meeting/Workshop to provide client with the review of the Web Services overview, presenting Web Services documentation, data dictionary and API/Session Keys.
- Cornerstone: Enable Web Services in all requisite environments and generate API and Session Keys.
- Cornerstone: Review client use cases.
- Cornerstone: Provide support to address questions during client development and testing of Web Service queries.
- Client: Test and confirm the ability to connect to the Web Services
- Cornerstone: Support the client side configuration and testing of the solution
- Client: Provide sign-off on completed configuration and Web Services integration

### The following activities will be delivered to complete implementation:

- Kickoff Meeting
- Configure Portal
- Get Started
- Development and Testing Support
- Service Service Definition
- Kickoff Meeting • Kickoff Meeting to include an overview of the following subjects:
  - What is Web Services
  - What is CSOD's Web Services Offering
  - How does it Work
  - Review API Key generation
  - Review Session Key generation
  - Overview of Service Available
  - Review a Sample Query and Use Case
  - Configure Portal
- Configuring the Portal includes the following activities:
  - Turn on Web Services in Live, Pilot, and Stage
  - Set Account Permissions
  - Generate an API Key
  - Generate a Session Key
- Get Started • Configuring the Portal includes the following activities:
- Review Use Cases
- Review CSOD Sample queries to get developer started; based on clients install module(s)
- Development and Testing Support
- Support Client Development and Testing Activities:
- Troubleshoot and Explain error messages
- Provide Consultation of Approach and Best Practices
- Manage expectations

### Assumptions

- Scope is limited to the setup and configuration of Cornerstone Web Services. Client is responsible for any infrastructure and/or development to call/execute Web Service.
- Cornerstone will not develop any queries. Any such requests are out of scope and will require a new SOW at additional costs.
- Client is aware that this solution provides direct-connect access to client instance of the Cornerstone database
- Client may wish to create data access controls outside of the Cornerstone platform to manage access control to this Web Services
- Client has skilled software resources to integrate with or directly call/execute using proprietary or 3rd party database management tools
- Cornerstone maintains the Web services documentation and data dictionary schema and provides updates available to client as the database changes. As with feature enhancements, clients will have up-to 3 weeks to review and test changes prior to changes being released to the clients' production environment.

## Historical Data Load – Salary

### Brief Summary

Migration of a single set of legacy Salary data to the Cornerstone portal. Migrated data includes the following data types:

- Past Salary Adjustment Data
- The Historical Data Load project is limited to loading a maximum of 1 data file containing a maximum of 1,000,000 records

Migration of master system data to the Cornerstone portal. Migrated data includes the following data types:

- Past Salary Adjustment Data

### Historical Data Load – Salary

#### Tasks

- Cornerstone: Provide Client with the Cornerstone standard data design document template
- Cornerstone: Lead Client in data loading workshops to review data load process and support the functional decisions of Client
- Cornerstone: Create data design document for Client
- Client: Sign off on data design document
- Client: Prepare files for loading by Cornerstone integration consultants
- Cornerstone: Load files into the pilot portal system
- Client: Review and correct any errors detected in the upload process
- Cornerstone: Reload corrected files as necessary in pilot portal (up to three (3) iterations per data type)
- Client: Review and approve data loaded to pilot portal
- Cornerstone: Load data on live portal

#### Assumptions

- Utilizes Cornerstone standard data design document template for all data types
- All data loads referencing user data does so by a common unique identifier
- Applicant and reviewer attachments include any files of type allowed by the Cornerstone application
- Client is responsible for uniquely identifying records across all data types
- Client has skilled software resources that can extract legacy data from source systems
- Client has the ability to transform data to the format(s) defined by Client-approved data design document
- Client will perform all data file consolidations necessary by data type defined above
- Three (3) iterations of loads by data type are for the purposes of correcting errors and all three (3) may not be required

### Inbound Data Feed – Salary (IDFS)

#### Brief Summary

Integration with Client's salary data enabling automated maintenance via a scheduled Inbound Data Feed of Salary (IDFS) data

#### Tasks

- Cornerstone: Provide Client with the Cornerstone standard IDFS design document and template
- Cornerstone: Lead Client in IDFS workshop to review data feed process and support the functional decisions of Client
- Cornerstone: Create IDFS design document for Client
- Client: Sign off on IDFS design document
- Client: Load files on pilot FTP folder for load, complying with Cornerstone's formatting requirements
- Cornerstone: Schedule IDFS to run in pilot portal on a regular basis to allow testing by Client
- Cornerstone: Email the pilot IDFS log file to identify load errors, after each load attempt
- Client: Review, update, and sign off the IDFS process in pilot portal
- Client: Load files on live FTP folder for load, complying with Cornerstone's formatting requirements
- Cornerstone: Schedule and automate IDFS in live portal
- Cornerstone: Email the live IDFS log file to identify load errors, after each load attempt
- Client: Review, update, and sign off on the IDFS process in live portal

#### Assumptions

- Client utilizes Cornerstone standard IDFS design document and template for all data types
- Client is responsible for uniquely identifying records across all data types
- All data records referencing user data does so by user's unique identifier value (UserID)
- Client has skilled software resources that can extract data from source systems and transform data to the format(s) defined by the approved IDF design document
- Client will perform all data file consolidations necessary and provide data files in formats defined in the approved IDFS design document. All required data fields must be populated for all records
- Client is responsible for properly validating IDF and identifying any errors prior to signing off on feed in live portal
- Client acknowledges that once the design document is approved, any changes or modifications to the work scope or the feed will require creation of a change request document. Change requests are reviewed and could result in additional charges to Client
- Any changes following Client signoff will require a work order or SOW submission

### Post-implementation Consulting Support

#### Brief Summary

**Post-implementation Consulting Support**

Cornerstone will provide up to 8 hours of Implementation Consulting support after completion of the Now or Realize module implementation.

The Post-implementation Consulting Support will be delivered entirely remotely via pre-scheduled web meetings and over two calendar weeks, and is intended to provide Clients with rapid response to issues experienced in the days immediately following completion of implementation.

**Tasks**

- Client: Records and reports items for review in project log
- Cornerstone: Implementation Consultant reviews project log daily and triages, investigates and identifies resolution path for each item and records in the project log (up to 5hrs)
- Cornerstone: Implementation Consultant conducts 3 x 30min remote sessions per calendar week (up to 3hrs) to discuss newly reported and closed items with Client
- Client: Actively participates in 3 x 30min remote sessions per calendar week (up to 3hrs) to discuss newly report and closed items with Implementation Consultant and then takes further action as needed

**Assumptions**

- The post-implementation consulting support will be consumed after completion of the scheduled Now or Realize module implementation and at mutually agreeable dates and times
- Consumption of the post-implementation consulting support service is linked with the module implementation and so consideration should be given to aligning this with the selection of Now or Realize module implementation slots in the published timetable
- The Client will make available up to two representatives available for the remote sessions. Representatives should be the nominated participants of the Now or Realize module implementation
- The post-implementation consulting support sessions are intended as an opportunity to verbally communicate on items recorded in the project log. There are no deliverables following the session. For example CSOD will not amend the configuration of update documented processes, training guides etc. on behalf of the Client
- This is in addition to the Intensive Go Live support provided by Cornerstone Client Success Management and ongoing help provided by Global Product Support teams.

**Pre-implementation Process Workshop**

**Brief Summary**

Cornerstone will provide up to 8 hours of process review work based on Clients documented process, to align the Client to CSOD best practice process and Points of View (POV), and to call-out any variations in their 'to be' process.

**Tasks**

- Pre-workshop (up to 2hrs): CSOD consultant conducts review of Clients 'to be' process documentation, and preparation for workshop
- Workshop (up to 6hrs): CSOD conducts Client walk through of the 'to be' process maps for priority/primary user community and contrast to key features/functions with Clients representatives

**Assumptions**

- The pre-implementation process workshop will be completed prior to the start of the scheduled Now or Realise module implementation and at mutually agreeable dates(s) and time(s)
- The pre-implementation process workshop will cover the single module to be implemented for the priority/primary user community
- Selection of Now or Realise module implementation slots in the published timetable should consider the dependency of the preimplementation process workshop
- Client will make up to four (4) representatives (typically Subject Matter Experts/Process Owners/System Administrators) available to actively participate in the Workshop sessions. Representatives should be empowered to make lasting real-time decisions on behalf of the Client. Two of the representatives should be the nominated participants for the Now! or Realise module implementation
- The pre-implementation process workshop will be conducted entirely remotely via web meetings, or a mix of remotely and visit to Client premises. If delivered entirely remotely the workshop will be split into 3 x 2hr web meetings. If a mix, then the pre-workshop activity will be remote and the workshop will be delivered in a single visit
- All travel related expenses for on-site visits/activities are the responsibility of the Client
- The pre-implementation process workshop is intended as an opportunity to verbally communicate and align ahead of the Now or Realise module implementation. There are no deliverables following the workshop. For example, CSOD will not document new processes etc. on behalf of the Client

**Project Manager**

**Brief Summary**

## Project Manager

The Project Manager manages the successful delivery of the Project, from the initial onset through to final closure for the Project. The Project Manager works in partnership with joint project teams and is focused on aligning and executing to the project schedule, managing tasks, scope and budget. Project Manager hours are included as a fixed fee service. The Project Manager will partner with the Customer Project Manager to ensure effective allocation of these services during the project. Hours and pushed timeline beyond the allocated, planned amount and schedule will require a change order and may result in additional expense.

### Cornerstone Tasks

- Works with the customer Project Team to create a tailored Project Plan as per the scope of the Project Statement of Work.
- Cornerstone “owns” the Project Plan, all updated statuses, and is responsible for engaging and coordinating with the customer project manager for updates and adherence.
- Manages and coordinates all involved Cornerstone personnel/resources.
- Serves as the initial escalation lead for all critical issues.
- Conducts joint bi-weekly Status Meetings
- Provides bi-weekly status report
- Responsible for Backlog, Issue and Risk Management
- Review and confirm all planned activities as part of Ready for Launch, the Project Manager aligns to Cornerstone’s implementation methodology and leading practices.
- If needed, activities including cutover planning and scheduling, of all Cornerstone personnel/resources is the overall responsibility of the Cornerstone Project Manager.
- Responsible for the coordination of the transition to Support and/or Customer Success if those services are included in the Statement of Work.
- Facilitates the request for survey responses, and reviews survey feedback following delivery of services provided by Cornerstone as described in this Statement of Work.

### Assumptions

- Project Management will be delivered remotely except for any specific activities described as ‘on-site’ in this Statement of Work.
- Project documentation and reporting will be based on Cornerstone’s toolkits and templates (such as project plan).
- A change in project related documents, formats or tools may result in a Change Order for purchase of additional hours.
- Customer will assign a Project Manager to coordinate customer’s resources and deliverables.

## Single Sign On (SSO) – AES Encrypted, SAML 1.1, or SAML 2.0

### Brief Summary

Cornerstone to provide support on one of the following Single Sign On (SSO) integration from and outsider portal to Client’s Cornerstone Portal:

- AES Encrypted
- SAML 1.1
- SAML 2.0

### Tasks

- Cornerstone: Provide Client with the Cornerstone SSO Technical Documentation
- Cornerstone: Lead the Client in SSO workshops to review SSO process and support the functional decisions of the Client
- AES Encrypted Single Sign On (SSO)
- Cornerstone: Provide sample code for Pilot Portal and Live Portal to deploy the AES SSO
- Cornerstone: Provide the AES end point URLs to the Client
- Client: Populate, encrypt and post the token as per Cornerstone requirements
- Client: Deploy, test and sign off the AES Encrypted SSO in Pilot Portal
- Client: Deploy, test and sign off the AES Encrypted SSO in Live Portal
- SAML V 1.1 OR SAML 2.0 Single Sign On (SSO)
- Client: Provide:
  - Base64 encoded – X.509 public Certificate (.crt, .cer)
  - Base64 encoded sample SAML Response Assertion (.txt)
- Cornerstone: Configure Client’s Pilot Portal with SSO SAML 1.1 OR 2.0
- Client: Review and sign off on SSO SAML 1.1 OR 2.0 in Pilot Portal
- Cornerstone: Configure Client’s Live Portal with SSO SAML 1.1 OR 2.0
- Client: Review and sign off on SSO SAML 1.1 OR 2.0 in Live Portal

### Assumptions

- Client utilizes Cornerstone standard SSO Design Specifications and complies to Cornerstone requirements to integrate AES Encrypted SSO, SAML 1.1 SSO, or SAML 2.0 SSO only.

**Single Sign On (SSO) – AES Encrypted, SAML 1.1, or SAML 2.0**

- Any other type of Single Sign On Solution Integration other than the above mentioned items is outside the scope of this project and considered a custom Single Sign On Solution. Client is responsible to make sure User Identification values (UserID, Username OR Email address) are unique and matching existing users in the CSOD portal
- AES Encrypted Single Sign On (SSO)
- Client has skilled software resources (Java or .Net programming) available who can establish an AES Encrypted SSO protocol and configure authentication to support CSOD's AES Encrypted SSO
- Client has skilled software resources available who can establish an SSO SAML protocol and configure authentication to support Cornerstone's SSO SAML V1.1 OR 2.0 Single Sign On (SSO)
- Client will transfer the Assertion and Certification files to Cornerstone as per Cornerstone requirements defined on design specification document and will only transfer them through FTP folder (not email)
- The assertion is signed using an X.509 certificate, sha1RSA algorithm and is Base64 encoded
- Client acknowledges that once the design document is approved, any changes or modifications to the work scope will require creation of a Change Request document. Change requests are reviewed and could result in additional charges to the Client
- Any changes following Client signoff will require a Work Order or SOW submission

**Cornerstone Learning Experience Data Connection – CSX**

**Brief Summary**

A scheduled API Based Integration from Cornerstone to Learning Experience (LX) that supports the following data types:

- Learning Content from Cornerstone sent to LX (Smart Cards)
- User profile data from Cornerstone to LX
- Transcript assignments and completions from Cornerstone to LX
- Skills Library data from Cornerstone to LX
- Bidirectional User Skills Sync
- Single Sign On (SSO) between Cornerstone and LX
- Learning Playlists from Cornerstone sent to LX (Pathways)
- Organization data from Cornerstone to LX (if used for TMP)

**Tasks**

**Cornerstone Deliverables**

- Copy Down on CSX
- Lead Client workshop to review current Cornerstone portal configurations, review integration functions and features
- Support Client with integration decisions
- Create design mapping document with Client
- Schedule integration to test environments
- Enable all deeper integration functionality
- Correct any error or changes detected by client during testing process
- Schedule and automate the integration with production portal based on Client's request
- Enable Integration Hub and conduct knowledge transfer to customer of set up

**Client Deliverables**

- Participate in design workshop
- Provide input in needed data
- Sign-off on design document
- Review and identify any errors detected in the integration process
- Review and approve integration in test environment
- Review and approve integration in production
- Post production sign off customer is responsible for error monitoring

**Assumptions:**

- Integration Engagement utilizes Cornerstone/LX Standard design documentation
- All feature functions that are available with the connector can be reviewed in Online Help within the Integrations section under Internal Learning Management Connectors: <https://help.csod.com/lxp/Content/Resources/Homepage/Homepage.htm>
- Not bidirectional
- Historical data loads may require use of CSV file to be provided by the client for first time load, if over a million records
- Integration supports hourly transmission of data from Cornerstone to LX
- Will only support up to 500 direct reports per one person
- Limit of 20 user custom fields can be configured
- Do not support custom relationships
- Only USD pricing supported
- Certifications are not supported
- Security roles and groups are not supported
- Organizational unit custom fields and training custom fields are not supported
- Email Address in Cornerstone must be populated and be unique
- Any changes following Client sign-off will require a work order or SOW submission; this includes any release enhancements

**Cornerstone Widget Extension**

**Brief Summary**  
 Learning Experience widgets extend learning beyond the web application and empower users to learn in the flow of work. The widgets enable organizations to upskill or reskill their employees with a single click, all while learning in the flow of work. The widget extensions can support the following data sets:

- User Profile
- Content Search, Share & Creation

**Tasks**

<p><b>Cornerstone Deliverables</b></p> <ul style="list-style-type: none"> <li>• Review data design with client</li> <li>• Enable integration in Sandbox using credentials provided by client</li> <li>• Review integration with client</li> <li>• Fix errors and make necessary changes</li> <li>• Enable integration in Production using credentials by provided by client</li> </ul>	<p><b>Client Deliverables</b></p> <ul style="list-style-type: none"> <li>• Provide required information for integration set up</li> <li>• Provide required information for SSO configuration</li> <li>• Review and provide any errors if applicable</li> <li>• Review and approval integration in Sandbox instance</li> <li>• Review and sign-off on integration in Production instance</li> </ul>
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**Assumptions**

- All data records referencing user data are by user's unique identifier values (Email and External ID)
- Client is responsible for properly validating integration and identifying any error prior to signing-off in production instance
- Integration relies on third party vendor APIs to capture data. Cornerstone is not responsible for changes to these APIs.
- Application widget is provided on external stores and are in accordance with the respective store's terms and conditions.
- Any changes following Client sign-off will require a work order or SOW submission

**Cornerstone Analytics Plus**

**Brief Summary**  
 Analytics Plus is a Reporting Suite offered by Cornerstone that provides strategic reporting dashboards and standard out-of-the-box reports.

**Tasks**

<p><b>Cornerstone Deliverables</b></p> <ul style="list-style-type: none"> <li>• Review data design with client</li> <li>• Enable Analytics Plus in Production</li> </ul>	<p><b>Client Deliverables</b></p> <ul style="list-style-type: none"> <li>• Review and sign-off in Production instance</li> </ul>
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**Assumptions**

- All data records referencing user data are by user's unique identifier values (Email and External ID)
- Client is responsible for properly validating integration and identifying any error prior to signing-off
- Any changes following Client sign-off will require a work order or SOW submission

**Upgrade to Galaxy – Learning Data ETL**

**Brief Summary**  
 Migration of learning content and transcript records from legacy portal to Cornerstone Galaxy. Migrated data includes the following data types:

- E-learning courses in SCORM or AICC format
- Materials (documents .pdf, .docx, .xlsx, .pptx, .bmp, .jpg, .gif, .m4a, .mp3, .wma, .wav, .mid, .avi, .mpeg, .m4v, .swf, or URLs), includes the current version only
- Videos as learning objects (.mpg, .mpeg, .wmv, .flv, .mp4, .m4v format or URL from YouTube)
- Questions and tests
- ILT Events and sessions
- User transcript records for E-learning, ILT events and sessions, external training (max 2 million records), materials, curricula, tests

**Tasks – Extract & Transform Data**

- Cornerstone: Discuss data migration scope and requirements with Customer to establish filter and transformation requirements
- Customer: Define and document data filter and transformation requirements
- Cornerstone: Extract data from source production environment

**Tasks – Load and Validate Pilot**

- Cornerstone: Load extracted data to Cornerstone pilot portal
- Cornerstone: Review data with Customer

- Customer: Validate data, identify corrections, and communicate details with Cornerstone
- Cornerstone: Troubleshoot and correct data errors and reload data to Cornerstone pilot portal
- Customer: Validate data, identify corrections, and communicate details with Cornerstone
- Cornerstone: Send Production load approval request
- Customer: Approve data load to production

**Tasks – Load and Validate Production**

- Cornerstone: Initiate new extract from source production environment based on pilot results and requirements
- Cornerstone: Load data to Cornerstone production portal
- Customer: Validate data in Cornerstone Production portal
- Cornerstone: Initiate delta extract from source Production environment (if needed)
- Cornerstone: Load delta data in Cornerstone Production Portal (if needed)
- Customer: Sign off on data load to Cornerstone production portal

**Assumptions:**

- E-learning courses are published in the SCORM 1.2, v2004, or AICC 3.5 format standards only. Online courses which are not compatible with the supported standards will be rejected. No Content transformation services are included
- Customer is responsible for providing unique identifiers for all records across all data types
- No data sources other than SumTotal, Saba, or Talentspace are in scope, external data sources must be scoped separately or manually loaded to Cornerstone Galaxy by customer
- This scope does not include user or core organization data, those data sources must be integrated into Cornerstone Galaxy from HRIS or similar source of truth prior to initiating this scope of work
- All references to users should do so by a common unique identifier which is supported and will be loaded to Cornerstone (i.e., common employee ID) and user exists in the portal prior to load
- Portal configurations are not included

**Upgrade to Galaxy – Performance Data ETL**

**Brief Summary**

Migration of performance data from legacy portal to Cornerstone Galaxy. Migrated data includes the following data types:

- Review scores, review documents, goals

**Tasks – Extract & Transform Data**

- Cornerstone: Discuss data migration scope and requirements with Customer to establish filter and transformation requirements
- Customer: Define and document data filter and transformation requirements
- Cornerstone: Extract data from source production environment

**Tasks – Load and Validate Pilot**

- Cornerstone: Load extracted data to Cornerstone pilot portal
- Cornerstone: Review data with Customer
- Customer: Validate data, identify corrections, and communicate details with Cornerstone
- Cornerstone: Troubleshoot and correct data errors and reload data to Cornerstone pilot portal
- Customer: Validate data, identify corrections, and communicate details with Cornerstone
- Cornerstone: Send Production load approval request
- Customer: Approve data load to production

**Tasks – Load and Validate Production**

- Cornerstone: Initiate new extract from source production environment based on pilot results and requirements
- Cornerstone: Load data to Cornerstone production portal
- Customer: Validate data in Cornerstone Production portal
- Cornerstone: Initiate delta extract from source Production environment (if needed)
- Cornerstone: Load delta data in Cornerstone Production Portal (if needed)
- Customer: Sign off on data load to Cornerstone production portal

**Assumptions:**

- Only active and approved goals will be migrated
- No data sources other than SumTotal, Saba, or Talentspace are in scope, external data sources must be scoped separately or manually loaded to Cornerstone Galaxy by customer

- This scope does not include user or core organization data, those data sources must be integrated into Cornerstone Galaxy from HRIS or similar source of truth prior to initiating this scope of work
- All references to users should do so by a common unique identifier which is supported and will be loaded to Cornerstone (i.e., common employee ID) and user exists in the portal prior to load
- Portal configurations are not included

**CHANGE CONTROL**

The agreed scope will be implemented according to the Project Plan, which will be agreed with the Client in the Plan phase. Any changes to the signed off Design Plan will be managed by the change control process. The Design Plan may be extended by length, and additional fees may be incurred.

Changes include:

- Additional requirements.
- Delayed completion of tasks according to the Implementation Plan.
- Rescheduling of meetings which delays the go live date.
- Incomplete tasks due to resources or skills.
- Agreed date changes based on business needs.
- Requests for additional services will also require a change order to this Statement of Work.

Client delays to the project timelines stated above will require a change order to this Statement of Work. Delays due to Cornerstone teams shall not trigger any additional costs for the Client. Documenting such changes and the pricing impact to the original project scope and costs will be managed and agreed between Cornerstone and Client. Work will not commence until respective Change Requests are completed, approved, and funded (where necessary), by Cornerstone and the Client. The Client will not unreasonably withhold agreement to such change orders.

**TIMELINE AND DELIVERY**

Project resources will be assigned within 15 business days from the order's effective date or start date, whichever is later. If the order start date is more than 15 business days after the effective date, project resources will be assigned on the start date unless otherwise specified in the special terms. Project resource assignment does not mean the project has kicked off. The official kick-off date will be mutually agreed upon, after resource assignment.

Services will be performed remotely by Cornerstone unless otherwise expressly stated as on-site within this Agreement. The Services will be delivered for the flat fee(s) specified below, with additional reimbursement for any pre-approved travel expenses mutually agreed upon in advance for on-site activities.

Some or all of this project may be delivered by consultants located within an India-based Cornerstone office. All Cornerstone resources will adhere to the working hours of the Client's time zone.

Project Components	Investments	
<b>Implementation Services</b>		
Cornerstone Performance - Implementation - ENT - Evolve	BUNDLE-SVCS-0012	Included
Succession Management Implementation - Enterprise	SVCSIMP0009	Included
Project Manager	SVCSBUS0035	Included
Pre-Implementation Process Workshop	SVCSBUS0147	Included
Cornerstone Extend Marketplace Integration Consulting	SVCSSEDG0075	Included
Consulting -Cornerstone Analytics Plus	SVCSEDC0103	Included
Compensation Management Implementation - Enterprise	SVCSIMP0008	Included
Post-implementation Consulting Support	SVCSBUS0146	Included
Consulting - Cornerstone Extend Import	SVCSBUS0161	Included
GTS - Inbound Data Feed - Salary (IDFS) Connector	SVCSDNS1008	Included

Consulting - Inbound Data Feed - Salary (IDFS) Connector	SVCSBUS0124	Included
Salary Data Load	SVCSTEC0105	Included
Consulting - Cornerstone Extend Import	SVCSBUS0161	Included
Consulting - Single Sign On - Standard (SSO) Connector	SVCSBUS0135	Included
Consulting - DomainKeys Identified Mail	SVCSBUS0159	Included
Learning Implementation - Enterprise	SVCSIMP0101	Included
Certification Management Implementation - Enterprise	SVCSIMP0007	Included
Upgrade to Galaxy – Learning Data ETL	SVCSIMP0188	Included
Consulting - Cornerstone Learning Experience - Implementation	SVCSIEDC0096	Included
Consulting - Cornerstone Learning Experience Data Connection	SVCSIEDC0098	Included
Consulting - Cornerstone Widget Extension	SVCSIEDC0101	Included
Consulting - Cornerstone Web Services	SVCSBUS0118	Included
<b>Total Service Investment</b>		<b>\$0.00</b>

The end of the Implementation Services is defined as the completion of the above Cornerstone deliverables as outlined within the Statement of Work. Acceptance of the deliverables will be in accordance with the Agreement.

**ASSUMPTIONS AND CLIENT OBLIGATIONS**

In order for Cornerstone to provide the Services outlined in this Statement of Work, Client shall provide the necessary resources to fulfill the obligations listed below:

- Select and assign knowledgeable, empowered Implementation team including the following roles, which may overlap:
  - Business Process Owner (Decision Makers)
  - Lead Cornerstone System Administrator
  - Project Manager of the Cornerstone Implementation
  - HRIS Technical Administrator (Optional, depending on data requirements and extraction capabilities)
  - Executive Stakeholder (Optional)
- Empower team to make real-time decisions regarding configuration and business process functions during the project.
- Ensure project team attendance and active participation during all phases of the Implementation project.
- Client will ensure the required training has been completed prior to the start of UAT.
- Formally accept (sign-off) all key deliverables and implementation services per the Agreement.
- Manage Client project staffing and milestones through Cornerstone provided work plan.
- Ensure completion of Client project deliverables.
- Attend and participate in implementation sessions.
- Provide a primary point of contact for Cornerstone during and after the implementation.
- Ensure proper change management communication to end-users during implementation in preparation for rollout.
- Cornerstone and Client agree that changes to key members of the implementation team or significant changes in business requirements or decisions, in each case by Client, that cause delays in the project timeline may require a change order to this Statement of Work. Change orders are reviewed mutually and may result in additional charges.
- Client is solely responsible for testing all processes during the UAT phase.
- For the Learning Module, the Client will use the Cornerstone Learning Content Loader to upload online content to the portal. All Client-provided content must be compliant with SCORM v1.2, SCORM 2004, xAPI, or AICC v3.5 standards.
- Any technical integration or service, historical data load, master data load, or data migration not expressly listed in this Statement of Work will be scoped as a separate work effort and is not included in the scope of this document.
- Client is solely responsible for testing all content and data loaded to the Cornerstone portal, whether through one-time uploads or recurring integrations. This includes, but is not limited to, tracking functionality, data accuracy, and verification of successful upload.
- Requests for application code changes are out of scope.
- Additional contracts may be required to utilize third party non-Cornerstone OnDemand services and integrations (such as job board aggregation, video interview, background screening, and Cornerstone Marketplace integrations.)
- For purposes of GDPR functionality: Client will ensure that all data fields related to controlling data retention processes are captured correctly

on the User record e.g. Legal Entity, Termination Date, Termination Reason and Employment Status. If Client only requires a single data retention period, Client will set-up one Legal Entity Organizational Unit. Client will activate the data retention processes for that Legal Entity by submitting a work order to Cornerstone's Global Product Support after the completion of the implementation deliverables. If Client requires multiple Legal Entities to fulfill Client's data retention policy requirements, Client will need to engage a Services Partner via a paid for Consulting engagement.

- This project will be delivered remotely unless expressly stated otherwise within this Statement of Work.
- Except where otherwise stated or agreed by the parties, Cornerstone's obligation to perform the Services set forth herein expires at the earlier of: (i) acceptance of the Service by Client; (ii) Twelve months of the later of the Order's effective date or start date; or (iii) if Client commences the project but subsequently does not proceed with the project, six (6) months from the date Client ceased working on the project.



Date: December 24, 2025

From: Tami Schatz-Douglas, Human Resource Director

To: Purchasing Agent

Via: Cheri Davis, HR Finance

Subject: Sole Source Procurement Request for Cornerstone, Inc. Galaxy Talent Management SAAS (software as a service) Platform

The information below is provided in support of my department requesting review for a single or sole source purchase/agreement with a cost of \$5,000 or more for goods and/or services.

Single Source       Sole Source

Supporting Documents: indicate which are included in the request from the list below.

Supplier Quote       Supplier Sole Source Letter       Final draft agreement  
 Final draft Form 11       H-11 approved by RCIT/TSOC       Grant Agreement  
 Other: \_\_\_\_\_

A. Requested Supplier Name: Cornerstone, Inc Supplier ID: 0000206098

**a. Describe the goods/service being requested:**

Cornerstone Galaxy, the flagship SaaS platform offered by Cornerstone OnDemand. Galaxy integrates with our PeopleSoft data using our existing data feeds, eliminating the need for extensive custom development.

**B. Explain the unique features of the goods/services being requested from this supplier:**

Cornerstone Galaxy is an AI-powered, unified workforce talent management platform that integrates learning management, compliance tracking, performance management, succession planning, and skills intelligence into a single solution. This platform is designed to proactively identify skills gaps, streamline compliance, and support our workforce's readiness for evolving demands. The platform offers enterprise-grade configurability that automates assignment, tracking, and certification reporting for complex, multi-jurisdictional compliance training, county-wide. The Galaxy Learn Platform ensures mandatory training completion (e.g., mandated reporter, harassment prevention, data security) and provides unified, audit-ready compliance reporting for State and Federal requirements.



As the parent company of both SumTotal and Galaxy, Cornerstone has developed built-in transition tools and processes that enable a smooth migration of all existing training records, content, and performance data. This approach minimizes cost, time, and operational disruption.

**C. What are the operational benefits to your department?**

Continuing our partnership with Cornerstone allows the County to maintain full data continuity with minimal user disruption. Because Cornerstone already supports our existing SumTotal platform, they have a deep understanding of Riverside County's data structure and system integrations, enabling a faster and lower-risk transition to Galaxy. Key Operational Benefits:

- Unified, Instant Reporting and Power BI connectors: HR and all County departments can now generate consolidated, audit-ready reports linking training compliance data directly to employee records in PeopleSoft, and other systems, eliminating manual cross-referencing and improving accuracy. Report development time is expected to decrease by approximately 10%.
- AI-Driven Efficiency: Galaxy's AI tools automate administrative tasks such as content setup, course assignments, and compliance tracking, reducing HR administrative workload by an estimated 15% and allowing staff to focus on higher-value workforce initiatives.
- Strategic Workforce Development: The system's analytics identify skill gaps across departments, enabling targeted training investments and improved budget allocation.
- Succession Planning: Cornerstone Galaxy centralizes performance data, career development plans, and competency profiles into one platform, enabling the County to identify and develop future leaders with data-driven precision. Real-time analytics allow HR and department heads to assess readiness levels, close leadership gaps, and ensure continuity in critical roles.
- Organizational Goal Setting: Galaxy aligns individual, departmental, and County-wide objectives within a single, transparent system. Managers can cascade strategic goals, monitor progress, and adjust priorities in real time, fostering accountability and alignment across all departments. This improves performance tracking, supports evidence-based decision-making, and directly connects employee outcomes to the County's broader mission and service goals.

- a. **Provide details on any cost benefits/discounts:** Cornerstone charges a consistent pricing models across different government entities for shared services.



Costs for our remaining two (2) year agreement with Cornerstone SumTotal will be included with pricing on this agreement.

**D. Can this request be formally bid out or procured using a viable solution such as an existing cooperative agreement or existing contract with another department or public entity?**

Yes  No

a. If yes, please explain why you are requesting to utilize an SSJ process? N/A

**E. Has your department previously requested/received an assigned tracking number for a single or sole source request for this Supplier for the goods/service requested now? (If yes, please provide the reviewed single or sole source tracking number).**

Yes SSJ# \_\_\_\_\_  No

a. What was the total annual and aggregate amount? \_\_\_\_\_

**F. Identify all costs for this requested in the table below:  
If review is for multiple years, all costs must be identified below:**

Description:	FY <u>26/27</u>	FY <u>27/28</u>	FY <u>28/29</u>	FY <u>29/30</u>	FY <u>30/31</u>	Total
One-time Costs:	\$276,940.00	\$283,864.00	\$290,960.00	\$298,234.00	\$305,690.00	\$1,455,688.00
Total Costs	\$276,940.00	\$283,864.00	\$290,960.00	\$298,234.00	\$305,690.00	\$1,455,688.00

\* Additional compenstaion of \$200,000 for a total of \$1,655,688

**G. Period of Performance: 07/01/2026 - 06/30/2031**

Ratify Start Date (if applicable): N/A

Initial Term Start Date: 07/01/2026 End Date: 06/30/2031

Number of renewal options (please provide those options: (i.e., one year with an option to renew four additional one-year periods): N/A

Aggregate Term/End Date: 06/30/2031

**H. Projected Board of Supervisor Date (if applicable): 01/27/2026**



By signing below, I certify that all contractual and legal requirements to do business with the selected supplier has been fully vetted and approved.

Tami Douglas-Schatz                      *Tami Douglas-Schatz*                      1/6/2026  
**Print Name**                                      **Department Head Signature**                      **Date**  
(Executive Level Designee)

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**PCS Reviewed:**

Arlene Jellison                                      *[Signature]*                                      1/07/2026  
**Print Name**                                      **Signature**                                      **Date**

Note: Once signed by the Department Head and PCS (signature lines above), the PCS will e-mail completed SSJ form with supporting documents to [psources@rivco.org](mailto:psources@rivco.org), and cc: Supervising PCS. Please reach out to your assigned PCS with any questions.

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**The section below is to be completed by the Purchasing Agent or designee.**

**Purchasing Department Review and Comments:** \_\_\_\_\_

Not to exceed:

One-time \$ \_\_\_\_\_

Annual Amounts reflected in completed chart for Question #4

Total Cost \$ 1,655,688

Aggregate Amount \$ \_\_\_\_\_

*Stacy Orton*                                      1/14/2026                                      26-110  
**Purchasing Agent Signature**                      **Date**                                      **Tracking Number**  
(Reference on Purchasing Documents)