*[[Include this Project Milestone and Deliverables Template in your solicitation and finalize as an Exhibit to the Contract during negotiations]].*

**EXHIBIT (X) – PROJECT MILESTONES AND DELIVERABLES TEMPLATE**

**Project Milestones and Deliverables Table**

**Between (NAME OF AGENCY/INSTITUTION) and (SUPPLIER NAME)**

**Issued Under**

**CONTRACT NUMBER VA-XXXXXX-XXX**

**BETWEEN**

**(NAME OF AGENCY/INSTITUTION)**

**AND**

**[SUPPLIER NAME]**

*[[Note: Instructions for using this template are in gray and enclosed in double brackets [[ ]]. These instructions should be deleted after the appropriate text has been added to this exhibit. Text that is highlighted in blue is variable based on the nature of the project.]]*

This Exhibit X, between (Name of Agency/Institution) and (Supplier Name) (“**Supplier**”) is hereby incorporated into and made an integral part of Contract Number VA-XXXXXX-XXX (“Contract”) between the (Name of Agency/Institution), and Supplier.

In the event of any discrepancy between this Exhibit X and the Contract, the provisions of the Contract shall control.

*[[The information contained in this milestones and deliverables table is an example only and must be modified based on your agency’s/institution’s project costs, deliverables and schedule. As a guide when completing this table, a milestone event is indicative of reaching a key stage in the project whereas a deliverable signals the completion of a project phase or key activity towards final project acceptance.]]*

The following milestones and deliverables are to be provided by Supplier under this Exhibit for the provision of (enter project name). The Exhibit X Requirements may include further detail on the content requirements for some deliverables listed herein.

This table identifies the project milestone events and deliverables, the associated schedule, any associated payments, any retainage amounts, and net payments.

*[[This table includes sample data only and must be customized for your project needs.]]*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Milestone Event** | **Associated Milestone Deliverables** | **Schedule Due Date (starting from Contract Execution)** | **Payment** | **Retainage (20%)** | **Net Payment** |
| Project Initiation | Project Kickoff | Execution + 5 days | --- | --- | --- |
| Project Initiation | Project Plan | Execution + 15 days | --- | --- | --- |
| Project Initiation | Project Charter including:  Quality Management Plan  Risk Management Plan  Configuration Management Plan  Resource Management Plan  Communications Plan | Execution + 30 days | $270,000 | $54,000 | $216,000 |
| Project Planning | Data Conversion Design and Strategy | Execution + 45 days | --- | --- | --- |
| Project Planning | Technical Architecture | Execution + 90 days | --- | --- | --- |
| Project Planning | Test Approach | Execution + 90 days | --- | --- | --- |
| Project Planning | Solution Blueprint | Execution + 90 days | --- | --- | --- |
| Project Planning | Requirements Traceability Matrix | Execution + 90 days | $500,000 | $100,000 | $400,000 |
| Implementation | Functional and Technical Designs | Execution + 120 days | --- | --- | --- |
| Implementation | Training Plan | Execution + 120 days | --- | --- | --- |
| Implementation | Configuration | Execution + 130 days | --- | --- | --- |
| Implementation | Build/Unit Test | Execution + 130 days | $500,000 | $100,000 | $400,000 |
| Implementation | Test Scenarios | Execution + 145 days | --- | --- | --- |
| Implementation | Conversion Results | Execution + 150 days | $250,000 | $50,000 | $200,000 |
| Testing | Test Scripts | Execution + 160 days | $100,000 | $20,000 | $80,000 |
| Testing | Test Results | Execution + 160 days | --- | --- | --- |
| Testing | Train the Trainer Results | Execution + 160 days | --- | --- | --- |
| Testing | Conversion Defects and Resolutions | Execution + 170 days | $250,000 | $50,000 | $200,000 |
| Deploy | Training Deployment Plan | Execution + 180 days | $100,000 | $20,000 | $80,000 |
| Deploy | Deployment Checklist | Execution + 180 days | --- | --- | --- |
| Deploy | Go Live Support Plan | Execution + 180 days | $500,000 | $100,000 | $400,000 |
| Stabilization | Production Go-Live | Execution + 190 days | $250,000 | $50,000 | $200,000 |
| Stabilization | System Stabilization | Execution + 210 days | --- | --- | --- |
| Final Acceptance | Solution | Execution + 230 days | $500,000 | $100,000 | $400,000 |
| *[[Add SLA reporting and any other reports required by the contract]]* |  |  |  |  |  |

Each deliverable will be delivered to the (Name of Agency/Institution) point of contact for the project, (Agency Point of Contact) at (Point of Contact Email Address), with a Deliverable Acceptance Receipt. The receipt will describe the deliverable and provide (Name of Agency/Institution) with space to indicate if the deliverable is accepted, rejected, or conditionally accepted. Conditionally accepted deliverables will contain a list of deficiencies that need to be corrected in order for the deliverable to be accepted by (Name of Agency/Institution)

*[[Note: Ensure there is adequate acceptance language in the contract addressing acceptance criteria and cure periods. VITA’s solution contract template contains that language.]]*