**EXHIBIT 1**

**STATEMENT OF WORK**



JUDICIAL BRANCH DATA WAREHOUSE, DATA INTEGRATION, AND MAINTENANCE AND OPERATIONAL SUPPORT SERVICES

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# Introduction

This Statement of Work (“SOW”), effective as of [DATE], outlines the tasks, professional services, and support required from the Contractor by the Judicial Council of California (hereafter “the Council”).

The Contractor must perform work in accordance with this SOW, and when mutually executed by the Contractor and Council under the terms and conditions of the Agreement. Capitalized terms used but not defined herein shall have the same meaning ascribed to them in the Agreement.

[**NTD:** This document provides the foundation for the Council’s required SOW. Revisions to this SOW will be made based on the responses provided by the Contractor, negotiations between the parties, and revisions approved by the Council. The final version of the SOW will be incorporated into the contractual agreement (the Agreement) between the Council and the Contractor.]

# Background Overview

## Data Analytics / Data Integration (DA/DI) Program

The Judicial Council and the Courts of California are looking to modernize use of data analytics in the judicial system. In 2021, a Data Analytics Pilot Program (“Pilot Program”) was established to demonstrate the use of data analytics to help the courts and Judicial Branch Entities (“JBEs”) obtain better insight to improving access and services for the citizens of California. Through the Pilot Program, the Council was able to develop a common, centralized data warehouse platform (the “Platform”) unifying data from several different case management systems into a single, cloud-based warehouse that could be used for analytical purposes. The Pilot Program was designed to help courts use data more effectively to understand business practices and obtain better insight into improving access and services for the citizens of California.

## Judicial Branch Statistical Information System (JBSIS)

The Superior Courts report aggregate counts of filings, dispositions, and other workload indicators using the Judicial Branch Statistical Information System (“JBSIS”). JBSIS fulfills the Council’s requirement to report on the business of the Courts and is used as the basis for workload models that allocate resources to courts based on the number of and type of matters heard in courts. Courts are required to submit reports to JBSIS on a monthly basis. Because of the connection to funding, it is critical that the data submitted are accurate, timely, and auditable. The specific data elements required to be collected are specified in the JBSIS manual and in data matrices that are used to map the Court Statistics Report and the workload models that are used for allocations of staff and judicial officers.

## CARE Act

Community Assistance Recovery and Empowerment (“CARE”) will require data collection and reporting to meet legislative guidelines. The CARE Act ([SB 1338)](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB1338) creates a new pathway to deliver mental health and substance use disorder services to the most severely impaired Californians who too often suffer in homelessness or incarceration without treatment. The CARE Act moves care and support upstream, providing the most vulnerable Californians with access to critical behavioral health services, housing, and support.

CARE recognizes that to serve those with the most complex behavioral health conditions, we must do the hard work of prioritizing those who need help the most, providing a comprehensive CARE plan that honors self-determination to the greatest extent possible, and holding ourselves accountable to delivering services and housing that are key to long term stability and recovery.

## Community Mental Health Services

The Council provides State Department of Health Care Services (“DHCS”) with data from each Superior Court annually to support the Community Mental Health Services (“CMHS”) program’s legislatively mandated data collection and reporting. The court data includes the number and outcomes of certification review hearings held pursuant to Welfare and Institutions Code section 5256, petitions for writs of habeas corpus filed pursuant to Welfare and Institutions Code section 5275, judicial review hearings held pursuant to Welfare and Institutions Code section 5276, petitions for capacity hearings filed pursuant to Welfare and Institutions Code section 5332, and capacity hearings held pursuant to Welfare and Institutions Code section 5334 in each Superior Court.

## Scope of Work and Services Overview

The Contractor will be delivering this scope of work utilizing the Council’s existing enterprise architectural framework and its associated patterns and components. These include but are not limited to the following: the use of **Snowflake** as the database management and court tenancy control system; **Talend** as the extract-transform-load and extract load-transform (ETL/ELT) solution; **Power BI** as the business intelligence (BI) and data visualization and reporting service; **Azure Data Lake Storage** as the primary data ingestion and storage component and cloud services platform. The Contractor will have core knowledge and experience/expertise in:

* Cloud Based Data Warehousing
	+ Analyzing, designing and developing data warehouse and data mart schemes to support data analytics, data visualization and reporting.
	+ Integrating information sources with the Judicial Branch’s cloud-based data warehouse, (e.g. **Snowflake**)
	+ Designing, developing, and deploying data sharing and data protection between multiple agencies and organizations.
* Automated Data Collection, Data Quality and Integration
	+ Analyzing, designing, and developing data exchange and integration between different government entities.
	+ Analyzing, design and development of automated data collection and integration using ETL/ELT solutions, (e.g., **Talend Enterprise ecosystem**.)
	+ Setup and deployment of automated data collection system supporting multiple agencies.
* Data Visualization and Reporting
	+ Performing Data Analysis and developing Data Visualization and Reporting using Commercially Off the Shelf (COTS) products, (e.g., **Power BI services**)
	+ Analyzing, designing and deploying data visualization and reporting platform supporting multiple entities.
* Cloud Expertise
	+ Architecting, designing, integrating and implementing above data services with Cloud Service Providers (CSPs), (e.g., **Azure.**)
	+ Working with, analyzing, designing and developing integration and data extraction from Court Case Management systems (CCMS).

The Contractor must also utilize the established end-to-end DA/DI platform and processes to support the branch and the participating courts, while recommending improvements and enhancements and implementing the approved changes.

Each section below includes a listing of minimum expected Deliverables applicable to that section, along with a responsibility matrix indicating the Council’s expectations as to whether the Contractor or Council has a role for each specified project activity. The responsibility matrixes in Tables 1 through 9 below identify each party’s specific roles and responsibilities, which include “Responsible,” “Support,” or “Approve” roles and responsibilities in connection with each specific activity. The exclusion of a responsibility matrix from any section does not relieve the Contractor of the duties and obligations of that section.

The completion of each phase of the project and the overall program will require approval from the Council Project Manager before the parties may move to the next phase.

The Contractor will respond yes or no to each requirement under the Responsibility Matrixes in Tables 1 through 9 below. If the response is no, then the Contractor shall provide a reason for why the requirement cannot be met and shall propose an alternative approach for the Council’s written approval. Failure to provide a comment to a no response as to why the requirement cannot be met may cause the Proposal to be deemed nonresponsive.

The Contractor will perform the majority of the work at its own facility. During the Term, the Contractor may meet at Council’s Work Location for Project Kickoff, Business Process workshops, Solution Design meetings, prototype reviews, training, and project closeout. The Council will provide the meeting space or tools for all required meetings held at the Council.

# Project Initiation and Planning

The Contractor shall provide and use a project management methodology approved by the Council for this data analytics, data migration, integration, and implementation, and data warehouse support (Data Services) project. The Council requires the Contractor to provide a robust project management methodology and best practices, such as the Project Management Institute’s Project Management Body of Knowledge (PMBOK) or an equivalent standard.

## Project Managers

Notwithstanding anything to the contrary under the Agreement, the Contractor shall provide an experienced Contractor Project Manager who will be responsible for all Services and Deliverables, and who shall work to ensure on-time delivery and successful deployment of the Data Services to the Council and the courts of California. The Contractor Project Manager will function as the Council’s primary point of contact. The Contractor Project Manager will manage risk, understand stakeholder needs, provide effective communication, promote project team collaboration, manage issues and deliverable progress, and manage Contractor resources throughout the project. The Council will have one Program Manager who oversees all aspects of the Data Services and Maintenance and Operation Support Services. The Council’s Program Manager will be the primary point of contact working with the Contractor.

## Project Charter

The Contractor shall provide a charter that sets out the specific details of the data migration, integration, implementation, and onboarding (the “**Project Charter**”) that includes, at a minimum, the following elements: project summary, project scope, stakeholders, project governance, roles and responsibilities, communication plan, success criteria, and measurements.

## Project Schedule

[**NTD***:* The project schedule and list of Deliverables will be added to final version of this SOW before contract execution]. The project schedule will include input and participation of the Council’s Project Manager and include tasks to be performed by the Council and Contractor Personnel. The parties shall apply the following standards to the project schedule:

1. Project management activities shall be documented.
2. The schedule shall outline tasks and Deliverables.
3. The detailed schedule shall include tasks, dependencies, critical paths, and resources (both Contractor and Council staff) assigned to each task.
4. Milestones shall be identified in the work plan to gauge the project’s progress toward meeting desired target completion dates.
5. Estimated work effort, duration, and start and end dates shall be shown for each task.
6. Assumptions made in developing the schedule shall also be documented.

The Contractor shall also provide a plan that sets out each of the Contractor’s project staff as well as the necessary project staff from the Council. Any changes to the Contractor Key Personnel during the project must be made in accordance with Section 1.6(b) of Appendix C to the Agreement.

Throughout the project, the Contractor Project Manager shall monitor project activities, update the project plan, develop further detail as appropriate, and work closely with the responsible Council Project Manager. On a monthly basis, the Contractor Project Manager shall submit project status reports. Any proposed changes to the agreed-to scope, schedule, and/or cost/budget must be approved by the Council’s Program Manager and respective Project Manager.

## Project Status Reporting

The Contractor shall provide weekly project status reports. Topics to be covered shall include but are not limited to the following:

1. Updates on project scope, schedule, budget, and risks/issues.
2. Review of prior action items.
3. Completed milestones and tasks.
4. Decisions, pending and previously made.
5. Planned activities for the next scheduled period.
6. Stakeholder & Communication management.

The Contractor shall also prepare monthly status reports for Executive Leadership. Topics to be covered shall include but are not limited to the following:

1. Updates on project scope, schedule, budget, and risk/issues.
2. Review of prior action items.
3. Completed milestones.
4. Decisions, pending and previously made.
5. Pending decisions; and
6. Planned activities for the next scheduled period.

## Risk Management and Mitigation Plan

The Contractor shall develop and provide the Council with a Risk Management & Mitigation Plan within two weeks of the Project Kickoff. The Risk Management plan must include a RAID (Risks, Actions, Issues, and Dependencies) Log that rates risks based on severity and probability of occurrence. The Contractor shall provide the Council weekly updates to the RAID Log over the life of the project. The Contractor must review, update, and distribute updates to the Risk Management & Mitigation Plan on a monthly basis.

## Issue Resolution

The Contractor shall use a methodology and software tool for issue identification, tracking, and resolution that shall be accessible to the Council’s Project Manager. The issue tracking process shall integrate into the configuration management and testing processes. Topics that will be included in issue management are:

1. Issue identification.
2. Issue tracking, reporting, and statuses.
3. Issue review, prioritization, and assignment.
4. Issue root cause analysis.
5. Issue escalation process.
6. Mitigation plan.

The Council and the Contractor will agree on a process for collaboratively resolving issues.

## Communication Plan

The Contractor shall document how communications will be managed throughout the project life cycle in consultation with the Project Manager. The Contractor shall define the types of communications (meetings, e-mails, website, documents, etc.), the frequencies of distribution, and the intended stakeholders. The Contractor’s staff shall have excellent communication skills and conduct themselves professionally at all times.

The Contractor shall maintain active communication with the Council to ensure project success. Communications between parties shall be performed through, but are not limited to:

1. Meetings.
2. Voice and web conferencing.
3. Emails.
4. Written reports and documents.

## Project Controls, Standards, and Procedures

The Contractor shall provide project controls, standards, and procedures. The Contractor shall submit these items for review and approval by the Council’s Project Manager within two weeks of the Project Kickoff. These requirements include but are not limited to:

1. Managing Project Documentation – Includes templates used (e.g., test cases, change request procedures), organization of project directories, naming conventions, and version control procedures.
2. Meeting Procedures – Includes tools and techniques to ensure that meetings are efficient and productive, and that discussions, decisions, and action items are adequately documented.
3. Scope Management – Includes scope control processes to ensure that work is not performed on out-of-scope features, functions, or tasks unless the Council provides written authorization. This includes processes to provide a competent assessment of the impact of potential scope changes to assist with the Council’s decision-making processes.
4. Communications Management – Includes a project communication plan for the types, frequency, and target audience for each communication.
5. Deliverable Outlines – Includes a template that outlines and identifies the content, the acceptance criteria for the Deliverable as required by the Council, the review complexity, and the Council approvers for each Deliverable (e.g., a “**Deliverable Outline Template**”).
6. Deliverable Reviews – Includes the process and time periods whereby the Council determines the readiness of a Deliverable for formal submission, provides feedback on deficiencies, and conducts subsequent reviews.

## Release Management Plan

The Contractor shall develop and maintain a plan that describes activities, roles, responsibilities, and scheduling related to the review, coordination, scheduling, and testing of the implementation and onboarding deployment.

## Project Management Deliverables

1. Project Charter
2. Project Schedule/Work Breakdown Structure (WBS)
3. Quality Management/Assurance Plan
4. Communication Plan (which includes Stakeholder Management)
5. Issues and Risk Management Plan
6. Staffing Plan
7. Project Control, Standards, and Procedures (e.g., Change Management Plan, etc.)
8. Release Management Plan

Table 1: Project Management Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Develop a Project Charter that defines the project summary, project scope, stakeholders, governance, communication, roles and responsibilities, and success criteria and measurements. | Responsible | Approve |  |  |
|  | Provide, update, and maintain a formal Project Management Plan. | Responsible | Approve |  |  |
|  | Develop and manage Project Schedule. | Responsible | Approve |  |  |
|  | Project Kickoff meeting. | Responsible | Support |  |  |
|  | Conduct Project Team Meetings. | Responsible | Support |  |  |
|  | Utilize the JCC provided repository to store, organize, track, control, and disseminate all documents produced by the Contractor and delivered to the Council. | Responsible | Support  |  |  |
|  | Manage Project Schedule throughout the life cycle of the project, which includes but is not limited to the following components: tasks, activities, milestones, resources, dependencies, task and activity durations, and critical path identification. | Responsible | Approve |  |  |
|  | Provide weekly project status reports that include:* Updates on project scope, schedule, budget, and risk;
* Review of prior action items;
* Completed milestones and tasks;
* Decisions, pending and previously made;
* Planned activities for the next scheduled period; and
* Stakeholder & Communication management.
 | Responsible | Approve |  |  |
|  | Provide monthly project status reports for Executives that include:* Updates on project scope, schedule, budget, and risk/issues;
* Review of prior action items;
* Completed milestones;
* Decisions, pending and previously made;
* Pending decisions; and
* Planned activities for the next scheduled period.
 | Responsible | Approve |  |  |
|  | Develop and manage Quality Management/Assurance Plan to ensure Deliverables fully meet requirements.  | Responsible | Approve |  |  |
|  | Develop and manage Risk Management Plan that shall be used, quantify the potential impact of each identified risk, present mitigation plans for each identified risk, and enact appropriate risk responses. | Responsible | Approve |  |  |
|  | Regularly analyze project risks and establish processes to prevent or manage risks. | Responsible | None |  |  |
|  | Monitor and manage project issues. | Responsible | Approve |  |  |
|  | Escalate critical system issues according to JCC Project Governance  | Responsible | Support  |  |  |
|  | Develop and manage Contractor Staffing Plan. | Responsible | Approve |  |  |
|  | Develop and manage Project Control, Standards, and Procedures. | Responsible | Approve |  |  |
|  | Develop and manage Release Management Plan. | Responsible | Approve |  |  |

## Project Team Training

The Contractor shall develop and maintain an onboarding process and documentation to ensure that project team members have a common baseline understanding of the project scope, roles and responsibilities, schedule, and tools and techniques. The Contractor shall be responsible for onboarding new project team members.

## Organizational Change Management Strategy

The Contractor shall lead a structured approach and provide guidance and mentoring to support a successful implementation and delivery of the Data Services. The Council recommends the use of a proven change management approach, for example, the Prosci ADKAR Model. The Contractor shall collaborate with the Council’s Project Team to coordinate change management activities.

The Contractor shall develop a comprehensive change management plan (“**Organizational Change Management Plan (OCM)**”) that incorporates the elements like those found in the ADKAR change management approach (Awareness, Desire, Knowledge, Ability, Repetition) and that also identifies the impacted users (e.g., Council staff, courts, service providers, delegated courts, etc.) and analyzes the impacts on those users. The OCM Plan will also analyze the impact on operational processes through all necessary process mapping. If additional process mapping/planning is required, the Contractor shall assist with that as well. The OCM Plan will outline the activities that need to be accomplished in advance of the planned go-live stage. Note that “Training Services” below complements the Change Management Plan.

The Organizational Change Management Plan will have a communication component that outlines the change management methodology, approach, activities, dependencies, and assumptions for key stakeholders to support a successful transition from the current application and environment to the future application and environment for the Council.

Per the ADKAR change management approach, the Contractor shall ensure that users are appropriately aware and knowledgeable of the Platform.

## OCM Deliverables

1. Organizational Change Management Plan

Table 2: Organizational Change Management Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Develop and manage Change Management Plan that facilitates:* Analysis of Impact on Software Users;
* Analysis of Impact on Operational Processes;
* Additional Process Planning/Mapping, as needed;
* Outlining of the communications component of the Change Management Plan;
* Development of Readiness and Sustainment Materials (Documentation/User Manuals, etc.); and
* Sign-off on Change Management Plan.
 | Responsible | Approve |  |  |
|  | Provide analysis of impact on court and Council users. | Responsible | None |  |  |
|  | Provide analysis of impact on operational processes. | Responsible | None |  |  |
|  | Provide additional process planning/mapping, as needed. | Responsible | None |  |  |
|  | Provide outline of the communications component of the Change Management Plan. | Responsible | Support |  |  |
|  | Develop and maintain readiness and sustainment materials (documentation/user manuals, etc.) | Responsible | Approve |  |  |

# IDMS Data Integration

The Contractor shall support integration for the Platform environments with the Judicial Branch identity management system (IDMS)/Active Directory (AD) Services. Contractor shall provide the following:

## IDMS Integration Services

The Contractor shall provide and support the following IDMS **integration services**:

1. Manage, coordinate, collaborate and execute planning and design sessions with the Council’s Enterprise Architects and Subject Matter Experts (SME).
2. Manage and perform testing of the integrated systems.
3. Develop audit reports and other means for Council Personnel to validate.
4. Manage and resolve all integration issues, bugs, and defects.
5. Training and Knowledge Transfer to Managed Services (M&O) support and Council Personnel.

## IDMS Integration Deliverables

1. Successful systems integration of the Council’s directory service/IDMS system with the Platform.

 Table 3: Data Integration Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Provide integration access from Judicial Branch IDMS/AD Services to Platform. | Support | Responsible |  |  |
|  | Manage and implement the Platform integration with the Judicial Branch IDMS/AD Services. | Support | Responsible |  |  |
|  | Develop and perform the Judicial Branch IDMS/AD Services integration testing with the Platform.  | Support | Responsible |  |  |
|  | Perform the Judicial Branch IDMS/AD Services integration user acceptance testing. | Support | Responsible |  |  |
|  | Train JBE personnel in the support of the Platform integration with Judicial Branch IDMS/AD Services. | Responsible | Support  |  |  |

# New Dataset Design

The Contractor shall lead System Design Sessions (e.g., Joint Application Design/Development – JAD sessions) for the new data sets with the Council and respective participating courts with the purpose of completing the design specifications that meet the Council’s Business and Technical Requirements. The Contractor may meet with all the business units collectively at the beginning of the System Design Phase. However, each business unit must be met with individually, with a representative from the Council and the court, at least twice and possibly more times to ensure acceptance of the design.

During the System Design Phase, the Contractor shall propose how to blend the commercial off-the-shelf (COTS) functionality with configurations from the existing Platform system to meet business requirements. While some business units are expecting to replicate functionality (such as to meet contractual obligations), others are interested in blending the best of the newer data sets with configurations from the existing system. The Contractor will provide recommendations on the System Design. The Business Unit Subject Matter Experts (“**SMEs**”) can provide input on the system design options for consideration. The expectation is that most of the time the Contractor and SMEs will be able to reach an agreement on the System Design. In the event of nonagreement, the Council will have the final say on design decisions.

At a minimum, the Contractor will perform the following during the System Design Phase:

1. Multiple meetings with the Council and SMEs and respective participating courts to understand and document business processes and detailed business requirements, as well as data sources and their transformation/enrichment rules/expectations.
2. Provide recommendations to improve the business processes using the Platform, including system automation.
3. Identification and documentation of changes to business process as a result of the System Design.
4. Collaborative design of data mapping, data marts, and data warehouse schemas.
5. Collaborative design of data collection and extraction, transformation, and load (ETL/ELT) process.
6. Collaborative design of new data sets for the **CARE Act** data from existing mental health case type schema with possible new data elements added to existing data dictionary, Judicial Council standardized values, and/or reference table mapping.
7. Collaborative design of new data sets for the **CMHS** data from existing mental health case type schema with possible new data elements added to existing data dictionary, Judicial Council standardized values, and/or reference table mapping.
8. Collaborative design of fact and dimensions tables into the branch wide cloud data warehouse, (e.g., Snowflake).
9. Collaborative design of updated Data Dictionary for each case type, (see Section F.2).
10. Collaborative design of Power BI reports and dashboards needed, with appropriate row and field level security built in to ensure restricted access based on roles, that also follow appropriate National Institute of Standards and Technology (NIST) RBAC model of RBAC (Role-Based Access Control) standards.
11. Discovery, analysis, and design of the Integration with the Council’s identity management system.
12. Meetings with the Council and court support staff to understand the technical aspects of the System Design.
13. Discovery, analysis, and design of batch data exports and transfer through the Council’s file transfer protocol (“**FTP”**) service from the system to a third-party server.
14. Identification and documentation of software gaps that result in business process changes.

## System Design Deliverables

1. System Design and development strategy plan.
2. Business process documents for the business requirements related to the Platform.
3. System Design documents including comprehensive configurations and setup of data marts, data warehouse schemas, data collection and ETL/ELT processes, new data sets for CARE Act data and CMHS data, fact and dimensions tables, Power BI reports and dashboards, and updated Data Dictionary.
4. Technical Design Specification should follow the Unified Modeling Language (UML) standard, defining the interfaces, functions, processes, attributes, workflows, etc., and business logic to implement the functionality.
5. Delivery of Requirements Traceability Matrix (RTM) – Requirements and traceability of each requirement delivery are documented in the matrix checklist, including test validation approvals throughout the project.
6. Physical Data Model includes model elements (such as tables, views, stored procedures, triggers, indexes, functions, and constraints) representing the physical structure of the database and model elements (such as schemas and tablespaces) representing the underlying data storage design of the database.
7. Design document(s) for the Council’s FTP service.

Table 4: System Design Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Provide System Design and development strategy plan. | Responsible | Approve |  |  |
|  | Provide Subject Matter Experts on business processes. | Support | Responsible |  |  |
|  | Coordinate Council participation in workshops (e.g., JAD sessions). | Support | Responsible |  |  |
|  | Review each requirement with the participating court for existing functionality (including enhanced) and propose a design solution to blend the best of prior configurations with the new functionality.  | Responsible | Approve |  |  |
|  | Review each requirement with the requesting participating court for new functionality and propose a design solution that leverages functionality, yet includes configurations, when necessary, to satisfy business needs.  | Responsible | Approve |  |  |
|  | Document the decisions from the System Design sessions for using functionality and performing configuration for each of the business requirements. | Responsible | Approve |  |  |
|  | Deliver a business process document for the processes related to the Platform to include business process definitions with accompanying business cross-functional flowcharts/diagrams. | Responsible | Approve |  |  |
|  | System Design document including comprehensive configurations and setup of data marts, data warehouse schemas, data collection and ETL/ELT processes, new data sets for CARE Act data and CMHS data, fact and dimensions tables, Power BI reports and dashboards, and updated Data Dictionary. | Responsible | Approve |  |  |
|  | Develop a design solution for the automated batch data export to a file (e.g., \*.xlsx) and SFTP transfer to third-party server. | Responsible | Approve |  |  |

# Development/Configuration

The Contractor shall provide professional services and lead the configuration in accordance with the System Design. The Contractor must provide access (in accordance with current Judicial Council security access standards) to the Platform for the support staff of the Council or the Participating Court during the development and configuration phase in order to allow the JBE staff to gradually improve their understanding of the Platform and how it can be best implemented for the respective JBE.

The Contractor’s approach will be an informative implementation of the software configuration throughout the project life cycle and the Contractor shall validate the design of business processes, provide knowledge transfer, and identify organizational change impacts. The Contractor must also follow established continuous integration/continuous deployment (CI/CD), DevOps/DataOps, automated environment best practices utilizing modern SDLC techniques for all new development efforts including enhancements and defect fixes.

## Development/Configuration Deliverables

1. System design and development strategy document.
2. Software configuration management plan.
3. Detailed Software application technical specification document.
4. System architecture design specifications document.
5. Configured/customized application software and testing.
6. Change request document and process.

Table 5: Development/Configuration Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Define and develop strategy plan document for data sets. | Responsible | Approve |  |  |
|  | Develop configuration management plan (e.g., including managing design review, IT configuration management tools, etc.). | Responsible | Approve |  |  |
|  | Define and develop technical design specifications document.  | Responsible | Approve |  |  |
|  | Configure Platform data marts, data warehouse schemas, data collection and ETL/ELT processes, new data sets for CARE Act data and CMHS data, fact and dimensions tables, Power BI reports and dashboards, and updated Data Dictionary. | Responsible | Approve |  |  |
|  | Configure and secure automated batch data exports.  | Responsible | Approve |  |  |
|  | Provide and document any performance-enhancement adjustments/configuration to the Platform.  | Responsible | Approve |  |  |
|  | Verify expected JBE functionality and business rules. | Support | Responsible |  |  |
|  | Prepare and manage change requests and document impact analysis associated with proposed changes. | Responsible | Approve |  |  |
|  | Update technical requirements documents (including requirements documents, configuration, security, workflow, use cases, and business flow diagrams). | Responsible | Approve |  |  |
|  | Provide and recommend configuration and technical documentation policies, procedures, and standards in conformance with the Council’s System Development Life Cycle. | Responsible | None |  |  |

## Reporting and Onboarding Functionality

The Contractor will configure the target environments, upgrade necessary components, develop processes as required. For each cycle, the Contractor will perform any corrective actions identified and follow up with the appropriate vendors on any technical issues. Contractor will also review established Power BI reports and dashboards with the corresponding SMEs, develop test scripts, and document the implementation details.

Additionally, the Contractor will develop and configure each data set utilizing the data services infrastructure, while also designing, developing, testing, and refining the data integration ETL/ELT pipelines to bring data from CCMS into the Platform.

Contractor will work with the Council and court’s technical Project team to manage, coordinate, and implement the technical work and perform necessary documentation & knowledge transfer, while ensuring the quality assurance process is built into the implementation process from the start of the project.

Onboarding of additional Superior Courts and Courts of Appeal to the Platform will require Contractor to follow the technology and integration framework protocols below:

1. Initial configuration of Snowflake tenant,
2. Talend installation,
3. Power BI dashboard development and configuration, and
4. Data Dictionary configuration and query review for each of the following case types:
	1. Appellate Court Appeals [04a]
	2. Appellate Division Appeals [04b]
	3. Civil-Limited [05a]
	4. Civil-Unlimited [05b]
	5. Family Law [06a]
	6. Felony [07c]
	7. Juvenile Delinquency [08a]
	8. Juvenile Dependency [09a]
	9. Mental Health [10a]
	10. Misdemeanor-Infraction [11a]
	11. Probate [12a]
	12. Small Claims [13a]

The Contractor shall also provide the following services to preserve and add to reporting functionality:

1. Load case-level data for the onboarding courts and the new datasets into a centralized data warehouse repository for analytics and business intelligence dashboards.
2. Update existing configuration to allow onboarding courts to leverage existing dashboards and reports.
3. Utilize established interface(s) for the real-time consumption of data from participating courts.
4. Create and configure separate data warehouse tenants for the participating courts.
5. Ensure newly onboarded court participants are configured to allow access to existing dashboards.
6. Integrate fact and dimensions tables into the branch wide cloud data warehouse, (e.g., Snowflake.)
7. Utilize established interface(s) for the real-time consumption of data from participating courts.
8. Utilize established ETL/ELT designs and pipelines for loading historical data from multiple source systems into Snowflake environments.
9. Setup of Talend/ETL infrastructure for Council and individual courts including on premise components, cloud components, while implementing security mechanisms *viz*. VPN, VPC etc., RBAC mechanisms using SSO, Azure AD following the established Council security guidelines.
10. Establish appropriate database link, shared data mart for collaboration between Council and courts.
11. Operationalize periodic data loads and remove manual intervention and implement alerting mechanism in case of system failure.
12. Create task scheduling, job dependency management and task automation such that the ongoing operational tasks are automated, and the end-to-end system can function with least manual intervention and supervision.
13. Develop and maintain solution to measure data load metrics over time along with a dashboarding and alerting mechanism to report variances.
14. Maintain the current levels of security patches on all the Platform components and ensure critical digital security vulnerabilities are prevented.
15. Incorporate feedback resulting from any digital security activities such as audits, threat modeling, Penetration testing etc. of the platform and perform in any relevant remediation and testing activities.
16. Ensure that reports function and return the expected data in the Platform. Per the System Design Phase, reports may be updated upon agreement from the Council and Contractor.
17. Train JBE support staff on how to create and maintain reports.

## Reporting and Onboarding Deliverables

1. Configured tenant and all associated components for each platform;
2. Configured Snowflake tenant for each onboarded court;
3. Installed Talend platform for each onboarded court;
4. Configured Power BI dashboards;
5. Updated and configured Data Dictionaries for each of the following case types and new data sets:
	1. CARE Act data set;
	2. CMHS data set;
	3. Appellate Court Appeals [04a]
	4. Appellate Division Appeals [04b]
	5. Civil-Limited [05a]
	6. Civil-Unlimited [05b]
	7. Family Law [06a]
	8. Felony [07c]
	9. Juvenile Delinquency [08a]
	10. Juvenile Dependency [09a]
	11. Mental Health [10a]
	12. Misdemeanor-Infraction [11a]
	13. Probate [12a]
	14. Small Claims [13a];
6. Ensure that existing current levels of security patches on all the Platform components are maintained; and
7. Trained Council Personnel for report development.

# Testing Services

The Contractor shall be responsible for following existing and/or developing and providing test plans, scripts, processes, tools, and test execution services that are necessary for Testing Services including but not limited to:

1. Unit Testing – Validates that configuration values operate according to approved design specifications
2. Business Process Testing – Validates that business processes are designed and configured as expected and can be fully executed and produce the predefined and expected results for each test script.
3. Performance Testing – Validates the readiness of the application to support the Council’s transaction-level and service-level agreements.
4. User Acceptance Testing – Validates the Platform is functioning as designed (including data migration if necessary) from the end users’ perspective and confirms that the Platform is ready to be moved into the production environment.
5. Regression Testing – Validates the operation of the Platform after application functional improvements and identifies any Platform functionality problems resulting from the application improvements and/or related to patch/updates.

The Contractor shall develop test scenarios, test cases, and test scripts that map testing according to the Council’s business functionality, performance, and technical requirements. Every business and technical requirement must be tested (i.e., mapped to the Requirements Traceability Matrix). The Contractor shall provide tools to facilitate the testing process, including those tools used for Performance Testing during implementation. The Contractor shall provide training on the proposed testing tools to all Council Personnel who are expected to use the proposed testing tools.

The Contractor shall deliver a series of test plans (“**Test Plan**”) that cover specific procedures and practices to be followed throughout the project. These plans shall cover all types of testing:

1. Unit Test Plan – Included as part of each development item. Acceptance criteria are defined by the Specifications. Depending on the Contractor’s testing approach, this plan may also include Unit Testing of software module configuration values.
2. Business Process Test Plan – Includes testing of the business process being implemented, including configured system components, reports, forms, batch job processing, security roles, and interfaces that apply across functional modules. Includes entrance and exit criteria for the Business Process Testing and documents the basis for Council acceptance of the Business Process Testing.
3. Performance Test Plan – Documents the approach, test protocols, and test cases for conducting Performance Testing to verify the ability of the Platform to perform for the anticipated transaction volume, number of users, and applicable service-level agreements. The Performance Test Plan will include entrance and exit criteria for the performance test and document the basis for Council acceptance of the Performance Testing.
4. User Acceptance Test (“UAT”) Plan – Documents the approach, test protocols, test cases, testing environment setup and refresh scheduling, identified users (e.g., Council business unit and external end users), and any required training necessary to complete acceptance testing. The UAT Plan will include entrance and exit criteria for the user acceptance test and document the basis for Council acceptance of the application system test. The Contractor needs to produce this deliverable for the project because on past projects Council staff have required multiple months to complete this deliverable and do not want to lengthen the project schedule.
5. Security Test Plan – Documents the approach for testing or otherwise establishing that security configuration requirements and all of the Council’s IT security policies have been met. The Contractor shall integrate security testing into each phase of testing, as appropriate for that phase of the overall testing effort.
6. Regression Testing Plan – Documents the approach for defining and running a set of test scripts intended to validate the operation of the Platform throughout the testing process to verify system integrity after functional improvements, fixes, patches, or application updates from testing activities.

All Test Plans shall include the following:

1. Procedures for tracking, reporting, and correcting issues (e.g., defects or bugs) identified during testing and the post-implementation monitoring period (e.g., 1–6 months of stability monitoring post Go-Live);
2. Roles and responsibilities of participants and facilitators;
3. Examples of forms, templates, and/or tools used for testing; and
4. Approaches to address testing for failed results and provide for regression testing to ensure reported issues are resolved.

During the development process, the Contractor shall perform tests in accordance with the approved test plans. To ensure that the Platform and each tenant has been fully tested, the Contractor must provide comprehensive documentation of test results with all exceptions analyzed, and any Defects must be corrected for review and approval prior to UAT.

The requirements for release to UAT shall be zero Severity Level 1 and zero Severity Level 2 Defects. The Council and the Contractor project team shall meet and mutually agree on an acceptable level for Severity Level 3 and Severity Level 4 Defects in order to move forward for UAT. If the parties cannot mutually agree on the resolution of Severity Level 3 and Severity Level 4 Defects, then the Council will have the final decision. Defect severity levels are defined as follows:

|  |  |
| --- | --- |
| Severity Level | Description |
| Severity Level 1 | A Severity Level 1 Defect is generated if a critical component or the entire application has stopped or is so severely impacted that the System or component cannot reasonably continue to operate and there is no workaround available.A Severity Level 1 Defect is generated if data is corrupted or there are data integrity issues related to security/confidentiality that lead to noncompliance with legal requirements or regulations. |
| Severity Level 2 | A Severity Level 2 Defect is generated if a critical or non-critical component of the System is unavailable or will not work but a workaround is available.A Severity Level 2 Defect is generated if a subset of data is corrupted or there are data integrity issues related to security/confidentiality that can be addressed with a resolution or agreed workaround. |
| Severity Level 3 | A Severity Level 3 Defect is generated if a non-critical component result is not as expected but a workaround is available and there is no significant impact to an end user. |
| Severity Level 4 | A Severity Level 4 Defect is generated for defects that are considered minor or cosmetic (other than Severity Level 1, Level 2, and Level 3 Defects) and a workaround or fix is available that has no functional impact to an end user. |

The Council shall have the responsibility for conducting acceptance testing of the entire application; however, the Contractor is required to provide support during UAT. The Contractor’s assistance to support the Council shall include:

1. Create the testing environments.
2. Creating/uploading testing data.
3. Loading configuration values, migrating data, and establishing user security in accordance with the “Go‑Live” deployment plan.
4. Performing backups.
5. Restoring or refreshing databases/environments as required.
6. Tracking, resolving, and reporting issue status for issues identified during testing.
7. Answering questions from testers as they arise.

Successful completion of the UAT will be required and all issues/defects must be resolved before the software can be approved for Go-Live decision for production use.

## Testing Deliverables

1. Master Test Strategy Plan.
2. Quality Assurance Plan.
3. Test Plans for Unit, Business Process, Performance, User Acceptance (UAT), and Regression testing.
4. Testing Scenarios.
5. Entrance and exit criteria requirements.
6. Successfully completed test results.
7. Completed acceptance testing assistance.
8. Documented procedures for monitoring and capturing user response-time metrics.
9. Completed tuning resulting from Performance Testing.
10. System/Application Bug/Defect logs.

Table 6: Testing Responsibility Matrix

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Testing Type** | **Activities** | **Contractor** | **Council** | **Contractor****Response****(Yes or No)** | **Contractor****Comments** |
| Unit Testing | Develop Unit Test Plan. | Responsible | Approve |  |  |
| Conduct Unit Testing for custom development. | Responsible | None |  |  |
| Conduct Unit Testing for Data Migration and Integration components (extract processes from legacy application, database, and spreadsheets, as well as load processes to legacy and external systems). | Responsible | None |  |  |
| Business Process Testing | Follow/develop Business Process Test Plan. | Responsible  | Approve |  |  |
| Follow/develop system test scripts for forms, reports, interfaces, data migration, enhancements, and workflows. | Responsible | Approve |  |  |
| Follow/develop system test scripts for interfaces and data migration components. | Responsible | Approve |  |  |
| Test forms, reports, interfaces, data migration components, workaround development, and workflows. | Responsible | None |  |  |
| Test interfaces and data migration components. | Responsible | None |  |  |
| Perform issue resolution for forms, reports, interfaces, data migration components, enhancements, and workflows. | Responsible | Approve |  |  |
| Performance Testing | Follow/develop Performance Test Plan. | Responsible | Approve |  |  |
| Document procedures to capture and monitor user response-time metrics. | Responsible | Support |  |  |
| Conduct Performance Testing. | Responsible | Support |  |  |
| Perform issue resolution as required to meet performance requirements. | Responsible | Approve |  |  |
| User Acceptance Testing  | Follow/develop UAT Plan. | Responsible | Approve |  |  |
| Provide UAT training. | Responsible | Support |  |  |
| Follow/develop UAT scripts. | Responsible | Approve |  |  |
| Execute UAT. | Support | Responsible |  |  |
| Set up the UAT environment, submit batch jobs, perform backups, restore databases, and execute data migration loads as reasonably required to support acceptance testing. | Responsible | Support |  |  |
| Maintain user profiles and security configuration for UAT testers. | Responsible | Support |  |  |
| Answer all questions submitted by UAT participants. | Responsible | Support |  |  |
| Provide issue resolution for forms, reports, interfaces, data migration components, enhancements, and workflows. | Responsible | Approve |  |  |
| Regression Testing | Provide, prepare, and deploy automated regression testing tool.  | Responsible | Approve |  |  |
| Execute regression tests. | Responsible | None |  |  |
| Identify and remediate issues. | Responsible | Approve |  |  |
| Quality Assurance Plan (QAP) Management | Manage and track status of test activities. | Responsible | Approve |  |  |
| Establish formal response time and capacity testing strategy and plans. | Responsible | Approve |  |  |
| Create entrance and exit criteria requirements for testing. | Responsible | Approve |  |  |
| Provide bug/defect reports. | Responsible | Support |  |  |
| Conduct test results review meeting. | Responsible | Approve |  |  |
| Complete and provide test results document for each test event.  | Responsible | Approve |  |  |

# Training Services

## Training Plan

The Contractor shall deliver a training and knowledge transfer plan (the “**Training Plan**”) that addresses all training, including but not limited to the following:

1. Training to provide end users the required knowledge and skills to use the Platform and new data sets;
2. Knowledge transfer training for Council support Personnel so that they can independently provide production support (including application and configuration support) for the Platform before conclusion of the post-implementation support;
3. A training curriculum document that outlines the training topics and content;
4. A training schedule for training materials and training delivery; and
5. Recommended training delivery channel(s) for each training approach.

All training materials must be reviewed and approved by the Council prior to the start of training delivery. Training materials may include but are not limited to user guides, training manuals, instructor manuals, webinars, and reference guides. The Contractor shall provide all electronic source documents and media used in the development and presentation of training across all training delivery channels. All training material and recorded media should be stored in a knowledge central repository accessible by Council support Personnel. The Contractor should plan to deliver training at the Council Work Locations, but in the sole discretion of the Council, training may be conducted remotely over Microsoft Teams or Cisco’s Webex tools.

## Knowledge and Skills Transfer Training

The Contractor shall deliver services to ensure that Council Personnel are prepared to operate and maintain the Platform at Go-Live. The Council Personnel providing Platform support are primarily in the Information Technology unit. Training content should include but is not limited to database schema, database objects and procedures, software configuration, system user-group security, and system operation procedures and automation. system, application, and configuration support).

The Contractor shall deliver a knowledge and skills transfer plan that will provide Council Personnel with the knowledge to use, support, and operate the Platform and new data sets (“**Knowledge and Skills Transfer Plan**”). This Knowledge and Skills Transfer Training will include all third-party applications that have been outlined in the proposal response (e.g., data migration tools and reporting tools).

The Contractor shall develop, maintain, and provide support staff with systems and operational documentation, system configuration documentation, and procedural documentation, including manuals, quick-reference guides, tutorials, online help, and other techniques as appropriate. The Contractor shall keep all documentation Deliverables current throughout the project.

## Training Deliverables

1. Knowledge and Skills Transfer Plan for the Council’s Support staff
2. Knowledge and Skills Transfer training materials
3. Knowledge and Skills Transfer training
4. Formal Knowledge and Skills Transfer sign-off by the Contractor and Council Project Managers

Table 7: Training and Knowledge Transfer Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Populate training environment with Council-specific data and initial transaction data to support training delivery and user scenarios, if needed based on training strategy. | Responsible | Approve |  |  |
|  | All training material and recorded media should be stored in a knowledge central repository accessible by Council support Personnel. | Responsible | Approve |  |  |

# Deployment

The Contractor shall provide a detailed Deployment Plan that documents all the activities for a successful promotion from the test environment(s) to the production environment. This includes the organization and execution of activities needed to transition operations to the Platform. Throughout the entire deployment period, the Contractor must provide at a minimum the Services described below.

## Release Readiness Checklist

The Contractor shall maintain a release readiness checklist (“**Release Readiness Checklist**”) that tracks major milestones required to determine whether the Platform is ready for deployment to include the Roll-Back strategy. This checklist must be reviewed and agreed by the Council before Go-Live as specified in the Deployment Plan to ensure the following tasks are met:

1. All testing has been successfully completed;
2. All Personnel have completed end user training;
3. All data has been cleansed, migrated, and accepted by the Council;
4. All interfaces are functioning as required;
5. All site preparation requirements have been met;
6. End User support has been established;
7. The System is determined to be production ready.

## Support Procedures

The Contractor shall provide procedures, establish processes, train support staff, track incidents, and participate in the delivery of end-user support. The procedure shall include but are not limited to the following:

1. Development of procedures for providing support that includes all activities, procedures, and steps necessary for Council Personnel to provide the required functional support;
2. Provision of support for Council Personnel;
3. Provide integration to the Council ticketing system for incidents, monitoring, and change management;
4. Tracking of incidents from Council Personnel
5. Tracking and reporting of incidents to Council Personnel.

The Contractor shall establish efficient and effective procedures for providing support before the beginning of production and through the end of the production support period (e.g., 1–6 months of stability monitoring after implementation).

## Court Go-Live Plan

The Contractor shall deliver a detailed go-live plan (“**Go-Live Plan**”) to reflect all project activities that affect deployment of the Platform into the production environment. This Deliverable shall document all steps required to make a successful go-live of the production environment, including specific go-live tasks, planned and actual dates for tasks completed, task responsibilities, task dependencies, estimated work effort required to complete each task, task status, results of task completion, and sign-off for each task completed. Additionally, the plan shall include:

1. Final data migration activities;
2. System preparation and changeover activities;
3. Resolution of all identified Severity Levels 1, 2, and 3 Defects;
4. Development of a rollout activities checklist;
5. Staffing requirements, by role and responsibilities, for both Contractor and Council Personnel for all deployment/rollout activities;
6. Provision of end-user support procedures that outline the processes for end users to obtain support in the post go-live environment;
7. Communications that have been developed, documented, and provided to stakeholders informing them of the deployment process and status;
8. Contingency plans in place to deal with system deployment issues that may arise;
9. Provision of a detailed back-out and recovery process that is documented and will be triggered if the release to production fails; and
10. Go-Live date and timeline.

The Contractor shall provide an overview to the project team of the Go-Live Plan to ensure common understanding of assignments, activity interdependencies, and deadlines. Additionally, this plan must serve as the guiding document for the project team’s work efforts in the weeks before Go-Live.

## System Deployment Deliverables

1. Release Readiness Checklist
2. Council Incident Management and support strategy
3. Operational Manuals, RunBooks, support procedures and document
4. Go-Live Plan (including detailed go-live runbook with start and stop runtimes)

Table 8: Deployment Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Develop and manage Go-Live Plan. | Responsible | Approve |  |  |
|  | Develop Go-Live checklist including go/no‑go decisions. | Responsible | Approve |  |  |
|  | Provide integration to the Council ticketing system for end user incidents, monitoring, and change management. | Support  | Responsible  |  |  |
|  | Coordinate implementation and support activities. | Responsible | Approve |  |  |
|  | Perform the Go-Live to the production environment as per the Go-Live runbook. | Responsible | Approve |  |  |
|  | Track and monitor progress during deployment and identify, escalate, and resolve issues and risks. | Responsible | Approve |  |  |
|  | Verify production environment is operational. | Responsible | Approve |  |  |
|  | Validate user acceptance testing (UAT).  | Support | Responsible |  |  |
|  | Update all documentation Deliverables prior to Go-Live. | Responsible | Approve |  |  |

# Maintenance and Operational (M&O) Support Services

In addition to the obligations set forth in Appendix F to the Agreement (Maintenance and Support Services), the Contractor must comply with the additional maintenance and support obligations as set out in this section. Such maintenance and support obligations will be deemed to be included as ”M&O” Support Services,” as such term is defined in the Agreement. M&O Support Services shall include but are not limited to:

1. Data Services and technical support for Platform.
2. Assignment of a single-point-of-contact Service Delivery Manager (SDM) for M&O support and Managed Services (e.g., managing, coordinating, and communicating changes) for the Platform solution.
3. Ability via configuration to make system changes necessary to support business changes.
4. Emergency support for break-fix situations via alerts and notifications.

M&O Support Services for the Platform will begin upon contract start date. Activities associated with the M&O Support Services include repairing defects and providing functional enhancements to the system as well as maintenance and operations support.

## M&O Support Deliverables

1. General Services and Reporting
2. Storage Services
3. Database Services
4. Middleware Services
5. Continuity Services

# Termination Assistance Services

[**NTD:** The final version of this Section K (Termination Assistance Services) may be removed from this SOW and incorporated into Section 8.5 (Termination Assistance) of Appendix C to the Agreement before the Agreement is signed, subject to negotiations and mutual agreement between the parties.]

Termination Assistance (“**Termination Assistance**”) Services shall be performed at the end of the Agreement in parallel with the M&O Support Services in order to transition the support of the system to the Council or a third-party service provider as designated by the Council. The responsibility of the Contractor will include the activities associated with the Termination Assistance support and knowledge transfer to the Council. Termination Assistance Services consists of the Services described in the following table.

Table 9: Termination Assistance Responsibility Matrix

|  # | Activities | Contractor | Council | Contractor Response(Yes or No) | Contractor Comments |
| --- | --- | --- | --- | --- | --- |
|  | Provide a Termination Assistance plan. The plan must contain transition task descriptions, an organizational chart, and job descriptions for all support staff. | Responsible | Approve |  |  |
|  | Provide all files, file and data definitions and relationships, data/document definition specifications, data models, APIs, design concepts, workflow and organization, screen displays and report layouts, reference manuals, user and operating guides and manuals, design specifications, functional specifications, internal use listing or manuals relating to error corrections, fixes and workarounds, and file and system cross-reference information relating to the Deliverables, in both paper and electronic form. | Responsible | Approve |  |  |
|  | Provide all maintenance and support tools, utilities, and diagnostic and support tools utilized by Contractor in the support and maintenance of the Deliverables. | Responsible | Approve |  |  |
|  | Provide all information, documentation, tools, and other materials regarding or relating to maximizing the use of the Platform to perform key operational functions including, without limitation, data/document backups, document uploads/downloads and security checks, and how to automate such functions to minimize manual intervention. | Responsible | Approve |  |  |
|  | Provide all information, documentation, tools, and other materials regarding or relating to methodologies that address traffic management, workflow balancing, segmentation, and capacity planning, routing, and overall Council system performance analysis. | Responsible | Approve |  |  |
|  | Provide all information, documentation, tools, and other materials regarding or relating to tools to support the integrated systems, performance analysis, and installation and maintenance of such tools. | Responsible | Approve |  |  |
|  | Provide all information, documentation, tools, and other materials regarding or relating to any and all updated, changed, or revised policies, practices, procedures, processes, and/or techniques with respect to the knowledge transferred to the Council hereunder. | Responsible | Approve |  |  |
|  | Provide any documentation, knowledge repository exports, change and incident management system data, digital files, and metadata file exports in a secure handoff to the Council upon the termination of the Platform delivery. | Responsible | Approve |  |  |

- END-OF-STATEMENT-OF-WORK -