

**ATTACHMENT A****SCOPE OF SERVICES**

The services to be performed by the Consultant shall consist of all services requested by the District's Agreement Manager to implement East Bay Paratransit's ("EBP") implementation of the new Software Platform and all associated tasks as listed below which shall include, but is not limited to, the following associated tasks as listed below:

- The Consultant shall provide oversight of Vendors and serve as Liaison for EBP to ensure vendor management across all solutions that will be part of the Paratransit Software Replacement Program.
- Consultant shall provide technology oversight to ensure an integrated Platform is Deployed across all technology and hardware components of the project.
- Consultant shall oversee and Advise on the Training Plan, Change Management Plan, and its activities as they relate to the scope of the Software replacement project.
- Consultant shall work at the program level during system integration planning and implementation to ensure the release planning is complete, the timing of each component is defined, and handoffs occur as needed.
- Consultant shall provide oversight of unit, integration, system, and acceptance testing, as well as monitoring and controlling quality assurance and defect resolution processes.
- Consultant shall manage and lead user acceptance testing and quality assurance for the integrated solution. This will include detailed testing plans, monitoring and controlling quality assurance, defect resolution processes, summary reporting and evaluation of the process to assess the Production Readiness of all the integrated components, and documenting test version outcomes and subsequent testing punch list items.

**Out of Scope**

Any task or work that is not related to supporting the implementation of the EBP Software Platform and Change Management activity. Inclusive of

- Develop business processes related to the Paratransit Software system.
- Oversight of any major enhancements or improvements beyond the scope of the current program.
- Oversight of process efficiencies not identified during the Spare platform's initial discovery and requirements-gathering phase.

**Overall Responsibility of Consultant for the Paratransit Software Replacement Components:**

- a) The Consultant shall provide Program Oversight and advisory consultation to EBP on the Spare Software Implementation including, but not limited to, the following:
  - i) Program Management
  - ii) Testing Leads for UAT and management and oversight of System Integration Testing
  - iii) Testing and Quality Assurance across all Program Components
- b) The Consultant shall provide Oversight and manage integration of other software components required to ensure complete functionality and features are available.
  - i) EBP Paratransit Contactless Payment
  - ii) Integration of UDI into the new Spare platform
  - iii) Other Broker systems, as identified during the planning and discovery phase of the project.
- c) The Consultant shall deliver proposals on the Data Retention and Analytics
  - i) The Consultant will plan for Data Storage for Escrow
  - ii) The Consultant will plan, oversee, and advise on Data Warehouse Analytics requirements

**Overall Responsibility of Consultant for the Success Criteria:**

- a) The Consultant will perform continued monitoring of the vendor's allocated budget, timeline, and scope.
- b) The Consultant will perform continued monitoring of the vendors' implementation on the quality of delivery and delivery of a seamless migration of all relevant data and system components.
- c) The Consultant shall oversee tight control, monitoring, and tracking of any critical issues or bugs reported within the first six months after implementation.
- d) The Consultant will ensure continuity of staff resources and business communications, invoicing, etc., during the project.

**Task 1: Program Governance**

1. Consultant shall be responsible for providing Project Management Services for the EBP Software replacement project in accordance with all vendor proposal and executed contract included but not limited to the following:
  - 1.1. The consultant will advise, review, and provide feedback to the Program Team on vendors' project documentation, including project management plans, risk registers, schedules, staff allocations, and other project management deliverables from each vendor.
  - 1.2. The Consultant will Coordinate and participate in required project meetings (kickoff, stakeholder, coordination, etc.) throughout the project lifecycle.
  - 1.3. The Consultant will Receive and provide feedback to EBP on all project status reports from the vendors. Consultant shall be responsible for summarizing across workstreams and presenting to EBP the summarized program-level status, risks, and issues.
2. Consultant shall perform overall Vendor Management oversight for the program:
  - 2.1. The Consultant will provide a point of contact for the vendors on all project matters. As needed, provide a program-level summary to EBP.
  - 2.2. The Consultant will work with the vendor(s) to address risk and issues and liaison with the Program Managers and as-needed Executives to obtain concurrence.
  - 2.3. The consultant will Escalate as appropriate to the Program Managers of the initiative to resolve project issues.
3. Consultant will provide the following Deliverables:
  - 3.1. Advise, review, and provide guidance and feedback on all vendor deliverables, ensuring adherence to the traceability matrix and approval timeframes.
  - 3.2. Provide regular program-level status reports to the EBP Program team on the individual workstreams' performance, vendor performance, and critical risks/issues that impact the project's scope, schedule, budget, and quality.
  - 3.3. Lead and host meetings as defined during the planning stage for the Program-level team and assist with planning and updates to Executive-level meetings. Will also support meeting agenda preparation, meeting notes and capture of final meeting artifacts in the project repository.
  - 3.4. Program management and governance deliverables – RASCI-Support, Risk, Action, Issues, Decision (RAID) document, and defined decision-making

**Task 2: Requirements, Development, and Design Governance.**

1. The Consultant will track Requirements compliance and traceability matrix at the Program level across all solutions
2. The Consultant will advise on and review vendor(s) design documents for quality and completeness.

3. The Consultant will provide guidance and technical consultancy to the EBP and the vendor as required throughout the lifecycle of this phase of the project, including design and development tasks across all workstreams.
4. The Consultant will provide the following Deliverables:
  - 4.1. Coordinate with the vendor(s) to maintain and track traceability of requirements across all solutions.
  - 4.2. Review and Advise EBP on comments on all submitted documents and align input.
  - 4.3. Responsible for Program level traceability matrix
  - 4.4. Track, monitor, and control all formal approvals, and ensure that all related artifacts are retained.

**Task 3: Testing**

Consultant shall oversee System Integration Test ("SIT"), User Acceptance Testing and final production acceptance testing by an agreed upon group of end users and technical stakeholders. Testing shall constitute the following actions but are not limited to:

1. Consultant will serve in an advisory and oversight role to review and gain approval of vendor(s) overall test management plan.
2. Consultant will serve in an advisory and oversight role to review and gain approval of each vendor's test plan and scripts.
3. Consultant will aggregate all test plans into an operational workflow for EBP to test.
4. Consultant will coordinate, monitor, and control the program's Systems Integration Test (SIT), User Acceptance Test ("UAT"), and Final acceptance testing phases.
5. Consultant will advise and report on Production Readiness across the Integrated platform to Move-to-production ("MTP").
6. Consultant will manage all aspects of Smoke testing after deployment of the solution.
7. Consultant will summarize testing and readiness assessment and review readiness for EBP for next GATE (SIT to UAT to MTP).

**Task 4: Training and Documentation**

Consultant shall advise and oversee end-user training and knowledge transfer to BART technical and EBP staff

1. The Consultant will serve in an advisory and oversight role to review and participate in training from the vendor(s) to ensure the quality and completeness of the deliverable materials.
2. The Consultant will perform an advisory and oversight role to review and participate in vendor system documentation to ensure the quality and completion of the delivered materials and deliverables and close on contractual obligations.
3. The Consultant will ensure appropriate sign-off by the EBP Program Team and Operations group of the final Training Plan and schedule(s) for Train-the-Training.
4. Consultant will oversight and coordinate full Operational training schedule with Broker and EBP program managers from AC Transit and BART.
5. The consultant will provide the following Deliverables
  - a. Validate and advise on the training materials, plan, and schedule to meet EBP operational requirements.
  - b. Advising, maintaining, and tracking the Operational training schedule.

**Task 5: Release Management, Implementation/Deployment, Transition, and Operational Go-Live**

Consultant shall perform release management active deployment readiness tasks, production management and warranty period support for the solution as outlined below:

1. The consultant will perform advisory and oversight role to review and provide feedback to EBP on vendor(s) implementation and transition plan.

2. The Consultant will define and coordinate the overall release plan across the workstreams.
3. The Consultant shall provide oversight of the implementation and transition to the new system, focusing on continuity of services to end customers.
4. The Consultant shall provide oversight as the system transitions into the entire operations phase.
5. The Consultant perform in an advisory and oversight role to review and provide input and guidance to the operations plans.
6. The Consultant will provide the following Deliverables
  - a. Input to the implementation and transition plans for each vendor
  - b. Overall Release management plan
  - c. Input to the Operations plan

**Task 6: Change Management**

The Consultant will assess the impact of the changes on operations and the readiness of the operational teams (e.g., customer service, scheduling, dispatch, drivers, etc.) to accept the changes to be implemented with the new solution(s). It also includes preparing a release and deployment strategy and approach. The program oversight will present findings and strategies to the EBP Program team.

1. The Consultant will provide the following Deliverables:
  - 1.1. Change Impact Assessment completion and summarization to EBP.
  - 1.2. Initial Readiness Assessment and Final Readiness Assessment
  - 1.3. Release and Deployment Strategy and Approach

**Task 7: Warranty Period and Operational Maintenance**

1. The Consultant shall perform advisory and Oversight in reviewing and providing feedback to EBP on solution issues post-implementation period.
2. The Consultant will ensure all documentation has been handed over to EBP for the solution from all vendors.
3. The Consultant will assist EBP in monitoring, controlling, tracking, and communicating all warranty defects to the contractor.
4. The Consultant will provide the following Deliverables:
  - a. Ongoing review of open issues and status report sent to EBP
  - b. Product Backlog updated as of Implementation period closure
  - c. Oversight and delivery of final report of Warranty Period issues and assessment of solution