

ATTACHMENT 5
WEB CONTENT MANAGEMENT STATEMENT OF WORK

1.0 Project Description

- 1.1 This Statement of Work document serves as the basis for the contractual agreement between the State and Vendor, hereafter referred to as “the Vendor”. It defines tasks to be performed and Deliverables to be produced to the AOC or AOC Group during the life of the contract. The Vendor will manage the project and create Deliverables using management tools and technical methods as described in the Project Definition Document (or other approved documentation provided to the State for review and approval), but must produce, as a minimum, the Deliverables to the specifications included in this Statement of Work.

2.0 Project Scope

- 2.1 This Statement of Work delineates the minimum activities, tasks, and methods required to deploy a web content management (WCM) solution. Detailed scope of this solution is outlined in Section 3.0 of this document, Scope of Services.
- 2.2 The Vendor will deliver focused services that facilitate rapid deployment of a web content management solution, satisfying the following objectives:
- 2.2.1 To simplify and expedite content creation, review and approval processes through the creation and use of standard templates, lifecycles and workflows;
 - 2.2.2 To manage web content in its most fundamental and reusable standard components;
 - 2.2.3 To support the design templates delivered to the AOC by the web redesign contractor;
 - 2.2.4 To expand control of web content through the use of enterprise-scale content management tools, functionality, and best practices;
 - 2.2.5 To streamline the entire content delivery process by providing an efficient cache and staging interface to existing web application servers;
 - 2.2.6 To implement a highly usable system and inform overall content management strategy for subsequent implementation of related content solutions and
 - 2.2.7 To establish repeatable processes and technical solutions, providing groundwork for continuous content migration and subsequent management within the vendor solution.

3.0 Scope of Services

- 3.1 The combined project team shall implement a web content management solution for the AOC and Appellate Court (AOC Group) internet and internal/extranet presences. These include the following **current sites**:
- 3.1.1 **California Courts Web Site** (www.courtinfo.ca.gov).
The California Courts Web site also includes:
 - 3.1.1.1 **California Online Self Help Center**
(www.courtinfo.ca.gov/selfhelp)
Legal self-help resources in both English, Spanish, and other languages.
 - 3.1.1.2 **Center for Children, Families & the Court** (CFCC)
(<http://www.courtinfo.ca.gov/programs/cfcc>)
 - 3.1.2 **Education Portal**
Includes educational materials, course calendars, and online learning curricula. The site also includes a sub-site:

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3.1.2.1 COMET

(Court Online Mentoring, Education, and Training) for the delivery site for online learning, streaming video, and MOODLE courses.

3.1.3 Serranus Extranet

Password-protected Extranet providing information and resources pertaining to court administration. The site is used by Judges, Court Executive Officers, Court Professionals, and AOC staff to share information regarding policies, programs, news, and other court-related initiatives.

3.1.4 Miscellaneous Web Sites

A collection of additional small sites that serve partners and clients who exchange court-related information with selected audiences. The content of these sites is not geared to the general public, but to specific niche audiences that do not have access to the Serranus Extranet.

3.1.5 AOC Intranet

Although it will be eventually migrated to the hosted WCM solution, the AOC Intranet is **out of scope** for deliverables outlined in this statement of work.

3.2 Future Web Site(s)

The sites listed above show the current state of the AOC web presence and demonstrate the breadth of our content. The launch of the content management system, however, will coincide with the launch of the new site redesign in progress with an outside vendor. Details are being finalized, but known now are the following characteristics of the new design:

3.2.1 All AOC sites will be integrated into a single site with a common architecture, templates, and navigation.

3.2.2 The success of the redesign will be very dependent upon a complex content segmentation plan determined by user role and a secure environment for user authentication.

3.3 Upon the Initiation phase of the project, the Parties will mutually modify and agree to the project schedule.

3.4 Project phases include Project Initiation, Logical Design and Requirements Definition, Installation and Configuration, Content Migration, Knowledge transfer and Project Closure.

3.5 A brief description of each phase and its associated Deliverables is provided in the table below. Each of the Deliverables identified in the table below are further described in Section 4.0 of this SOW.

Phase	Description and Deliverables
Project Initiation	<p>During Project Initiation, the Project Management Team shall establish the project site, assemble the project team, provide orientation to project team members, and conduct kick-off meetings. These activities are designed to get all project staff (AOC, Vendor, and Vendor sub-contract personnel) on the “same page” in terms of project roles, responsibilities, scope of work, reporting requirements and project standards.</p> <p>No Vendor Deliverables in this Phase</p>

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Phase	Description and Deliverables
<p>Logical Design and Requirements Definition</p>	<p>The Logical Design and Requirements definition will set the stage for subsequent development, configuration and implementation of the site(s).</p> <p>Logical Design is a plan for the system which states the organizational problem and how a content management system will solve it. It includes identification of the following: goals and objectives, audiences, publications, content types, authors, acquisition sources, content access structures, workflow and staffing.</p> <p>Requirements definition includes the analysis of the logical design as well as current web content creation, management and delivery processes to assess fit to standard templates and processes for implementing a content management architecture.</p> <p>The results of the logical design and subsequent analysis will be fully documented by the Vendor in the Logical Design and Functional Requirements Documents, which, when accepted by the State, will validate the scope and configuration parameters for the solution deployment.</p> <p>During this task, the Vendor will develop and deliver to the AOC Group the following Deliverable:</p> <ul style="list-style-type: none"> • Logical Design Document • Functional Requirements Document
<p>System Configuration</p>	<p>System configuration includes implementation of the web content management environment and configuration of functionality for content creation, management and delivery using the tools and templates provided by the products as defined in the Functional Requirements Document.</p> <p>During this task, the Vendor will develop and deliver to the AOC Group the following Deliverables:</p> <ul style="list-style-type: none"> • Configured Web Content Management Repository • Test scripts development for unit and user acceptance (UAT) testing cycles • Unit testing cycles

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Phase	Description and Deliverables
<p>Content Migration</p>	<p>Content Migration activities include the definition and execution of processes for disassembling, importing and assigning properties to existing web content in order to populate the content management repository. Additionally, it includes the subsequent validation of the migrated content and taxonomy for the resulting content repository.</p> <p>During this task, the Vendor will develop and deliver to the AOC Group the following Deliverables:</p> <ul style="list-style-type: none"> • Content audit • Process definition, content migration and import <p>The AOC will be responsible for content validation and testing cycles subsequent to completed content migration.</p>
<p>Knowledge Transfer and Training</p>	<p>Knowledge Transfer includes handoff of information from vendor consultants to AOC team members, end user training and documentation by consultants and team members for ongoing reference by system owners. See section 4.7 of Attachment 2, Minimum Terms and Conditions and related exhibits for more detail on requirements for these activities.</p> <p>During this task, the Vendor will develop and deliver to the AOC Group the following Deliverables:</p> <ul style="list-style-type: none"> • Train the Trainer Session <p>The AOC will be responsible for End User Training.</p>
<p>Project Evaluation and Closure</p>	<p>During Project Evaluation, the AOC Group will evaluate project Deliverables against the defined success criteria and metrics. The AOC Group will present findings and recommendations to the Project Management Team and the Management Team for review.</p> <p>During this task, the Vendor will develop and deliver to the AOC Group the following Deliverables:</p> <ul style="list-style-type: none"> • Project evaluation document • Project Wrap Up Session

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Phase	Description and Deliverables
	The AOC will be responsible for all other deliverables associated with project closure.

4.0 Detailed Deliverables by Phase

4.1 Project Initiation: No Vendor Deliverables

4.2 Logical Design and Requirements Definition

4.2.1 Logical Design Document

The Vendor shall conduct logical design workshops with State and court stakeholders. The State’s redesign partner will be invited to attend these sessions as deemed necessary by the Office of Communications Manager. The completed logical design shall include of the following components:

4.2.1.1 Summary of stakeholder goals for site

4.2.1.2 Audiences, participants, contributors or other individuals associated with the assets and processes

4.2.1.3 Summary of current site assets and processes

4.2.1.4 Summary of future site assets and processes

4.2.1.5 Vision for transformation of current web assets to future site

4.2.1.6 Content type identification and inventory

4.2.1.7 Content acquisition source identification

4.2.1.8 Taxonomy and metadata design

4.2.1.9 Content access structures (to be driven primarily by the new site information architecture)

4.2.1.10 Workflows and Staffing

4.2.1.11 Proposed content migration strategy and prioritization plan

4.2.1.12 Business Use cases, inclusive of process flows detailing the actions performed to complete a process and alternate flows/exception paths

4.2.2 Functional Requirements Document

The Vendor shall expand upon the logical design, detailing configuration requirements for all components of the AOC Web sites. This will detail requirements for content lifecycles, content creation, management, review and delivery workflows, authoring and publishing templates, security profiles and site caching.

4.3 System Configuration

4.3.1 Configured Web Content Repository

The Vendor shall deliver the web content management repository, populated with selected page components and related properties. The configuration shall include content lifecycles, content creation, management, review and delivery workflows, creation of authoring and publishing templates and configuration of site caching. This shall also include a staging (cache) area and target delivery site, configured with the appropriate object taxonomy and properties for receipt of content created

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from authoring and publishing templates. This deliverable shall achieve the desired site design documented in the Functional Requirements Document.

4.3.2 **Test scripts for Unit and User Acceptance Testing (UAT)**
The Vendor shall deliver Unit Test and UAT scripts. Unit Test scripts shall be driven by the functional requirements and Functional Requirements Document, and will provide for thorough validation of the configured system. The UAT scripts will be driven by the logical design use cases and provide for thorough validation of system performance and content. UAT scripts will map directly to the functional requirements.

4.3.3 **Unit Testing**
The Vendor shall conduct unit testing to verify that the configured solution and corresponding processes function in an integrated manner according to Functional Requirements Document. This testing will also validate fulfillment of the functional requirements in scope for the solution and determine the readiness of the solution for content migration and user acceptance testing.

4.4 Content Migration

4.4.1 **Content Audit**
The Vendor will conduct an audit to determine which content will be archived, deleted and migrated from the current sites to the WCM environment. This process will also include a review of page code marked for migration to the WCM. The Vendor will document results of the audit and deliver this document to the AOC group for review and approval.

4.4.2 **Process Definition and Content Migration/Import**
Based on requirements specified for the breakdown, property population and lifecycle association of web page components, the Vendor will define processes and facilitate the migration and import of existing web content from external systems into the WCM repository.

4.5 Knowledge Transfer and Training

4.5.1 **Train the Trainer Session**
The Vendor will conduct a "Train the Trainer" session for AOC personnel. This session will include delivery of training curriculum plan and user documentation for use in subsequent end user training sessions.

4.5.2 See section 4.7 of Attachment 2, Minimum Terms and Conditions and related exhibits for more detail on requirements for these activities.

4.6 Project Evaluation and Closure: No Vendor Deliverables

5.0 Deliverable Dates Table

5.1 The Vendor shall complete Deliverables by the estimated completion dates set forth in Table 1.0, below. Completion Dates are proposed and subject to negotiation.

Phase	Deliverables (* Critical Deliverables)	Completion Date
Project Initiation	<ul style="list-style-type: none">No Vendor Deliverables	
Logical Design and	<ul style="list-style-type: none">Logical Design Document*	July 25, 2008

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Requirements Definition	<ul style="list-style-type: none"> • Functional Requirements Document* 	
System Configuration	<ul style="list-style-type: none"> • Configured Web Content Management Repository* • Test scripts development for unit and user acceptance (UAT) testing cycles • Unit testing cycles 	<p>August 29, 2008</p> <p>August 29, 2008</p> <p>September 12, 2008</p>
Content Migration	<ul style="list-style-type: none"> • Content audit • Process definition, content migration and import 	<p>August 29, 2008</p> <p>October 24, 2008</p>
Knowledge Transfer and Training	<ul style="list-style-type: none"> • Train the Trainer Session 	September 19, 2008
Project Closure	<ul style="list-style-type: none"> • No Vendor Deliverables 	

6.0 The Project Management Process

- 6.1 The Vendor shall provide an on-site experienced Senior Project Manager to the AOC account.
- 6.2 The Vendor shall staff an upper-level relationship manager for this account, providing strategic support, a senior interface with AOC leadership, and a point of escalation for any and all needs.
- 6.3 The Vendor shall use Microsoft Project to manage the project timeline and Deliverables, offering a documented manner in which to monitor project progress and identify critical path Deliverables.
- 6.4 The Project Management Team shall deploy a secure project site which can serve as a central workspace for project documents (statements of work, Deliverable documents, project plans, etc.) and team contact information. This will be deployed during Project Initiation.
- 6.5 The AOC and Vendor will assemble a Project Management Team (Project Management Team), consisting of no more than three (3) representatives from each party. This team shall include the Vendor and AOC Program and Project Managers.
- 6.6 The Vendor shall coordinate Deliverable review via a process agreed upon by the Project Management Team.

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7.0 Deliverable Acceptance

- 7.1 The Vendor shall coordinate Deliverable review and acceptance in accordance with the process agreed upon with the AOC in section 4.2 of the Minimum Contract Terms.
- 7.2 The Vendor shall develop Project Deliverables in the form and format agreed to by the AOC and Vendor using the Deliverables Expectations Document (DED), and approved by the AOC. No work will be performed on any deliverable associated with a payment milestone until the DED has been approved in writing by the AOC. As each Project Deliverable is submitted, the Vendor must include a copy of the Project Deliverable's Expectation Document as the cover sheet. See Figure A-1 below for a template to be used for Deliverable Expectations Document during projects.

Figure A - 1. Template of Project Deliverable Expectation Document (Vendor to Repeat for Each Required Deliverable in Table 6.1 of this document.)

Project Deliverable Expectations Document	
Project Deliverable Number:	Title of Deliverable: <Insert>
Proposal Reference: <Insert>	Contract Reference:
Frequency: <Insert>	Draft Submission Due: <Insert>
State's Draft Review and Comment Period: XX Days	Final Submission Due: XX Days after receipt of draft comments
Approval Required: Yes/No	Distribution: AOC PM – one hard copy and one soft copy
Vendor: Complete shaded area below	
Prepared by (please print):	Date Submitted:
Date Submitted 2:	Date Submitted 3:
Phone Number:	FAX:
E-mail:	
<p>Deliverable Acceptance Criteria (include SOW requirements (and or requirement modifications agreed to by AOC through operational change processes), format and content description provided by Vendor related to deliverable as agreed to by AOC). Note that these criteria must be in accordance with the process agreed upon with the AOC in section 4.2 of the Minimum Contract Terms.</p> <p style="text-align: center; color: red;"><Insert Proposed Format and Content Description for Each Required Deliverable></p>	

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AOC Approval/Comments	
Approved by:	Date:
Signature:	
Comments:	

8.0 Progress Reports

- 8.1 The Vendor shall submit weekly progress reports to the AOC Project Manager describing Work performed, Work status, Work progress difficulties encountered, remedial actions, and statement of Deliverable(s) anticipated subsequent to the reporting period for approval prior to payment of invoices.
- 8.2 Each progress report shall include, but is not limited to, the following sections:
 - 8.2.1 Narrative summary: This section shall be a thorough statement of the Project activities and progress during the previous two weeks. It should include a discussion of any problems encountered, and any proposed changes to the Work set forth in this Statement of Work.
 - 8.2.2 Schedule status: This section shall State whether the Project is progressing according to the target Deliverable dates outlined in the Deliverable Dates Table in this statement of work. If delays have been experienced, the section shall include a discussion of how the Project will be brought back on schedule or any necessary revision to the schedule.
 - 8.2.3 Activities planned for next period: This section shall include a discussion of the work and associated Deliverables anticipated in the next period.
 - 8.2.4 Open Issues: When appropriate, this section shall include a discussion of open issues and methods proposed for issue resolution. This section shall assign specific resources (Vendor or AOC staff) to issues in an effort to obtain timely resolution.

9.0 Vendor Roles and Responsibilities

9.1 Project or Account Manager

- 9.1.1 Role: A Vendor Project or Account Manager will be assigned to manage, in conjunction with the AOC Project Manager, all areas of the consulting engagement including adherence to project schedules, task assignments, and budgets. This person will serve as the first line management representative for all matters related to Vendor consulting engagement responsibilities. The Vendor Project Manager will also verify and confirm project task Deliverables with the AOC Project Manager.
- 9.1.2 Responsibilities: The Vendor Project or Account Manager will work with the AOC as a member of the Project Management Team to develop and control all aspects of Vendor's consulting engagement, including adherence to consulting engagement schedules, task assignments and budgets. The Manager will verify and confirm project task Deliverables with the AOC Project Manager and maintain ongoing communication regarding project status with the AOC and Vendor management teams.

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9.2 Solution Architect(s)

9.2.1 Role: The Solution Architect(s) will be tasked with the review of AOC's procedures, fit gap analysis against the Vendor solution, and definition of the final solution requirements. These individuals will be the subject matter experts and solution leads from the Vendor team. They will be the focal point for all solution knowledge transfer to the AOC group during the course of the engagement.

9.2.2 Responsibilities: The Solution Architect(s) will have the responsibility to complete all the process review, solution definition and documentation, test plans and standards, direction and management of the solution development, and review of the final solution for presentation to the AOC group. The Solution Architects will work closely with AOC personnel assigned to the project to ensure the establishment and transference of a knowledge base from the beginning of the project onward

9.3 Solution Developer

9.3.1 Role: The Solution Developer will perform all necessary configuration of the Vendor application, and will perform initial testing of the configured application against design criteria.

9.3.2 Responsibilities: The Solution Developer is responsible for tailoring the Vendor application to meet the AOC's documented requirements as defined in the Functional Requirements Document.

9.4 Content Migrator

9.4.1 Role: The Content Migrator will perform activities related to content migration and import.

9.4.2 Responsibilities: According to defined processes, content migrators will move content into the Web Content Management solution via automated and/or manual means, perform quality assurance on migrated content and adding metadata to content following prescribed rules.