

## **Appendix B**

### **Scope of Work**

In addition to and in conjunction with the services outlined in this Agreement and appendices, during the term of the Agreement the Contractor shall provide the following services and support.

#### **1. Designated Site and Designated CPUs**

The Designated Site where the Licensed Software shall be installed and operated is the computer room within the offices of the Department of Elections in San Francisco City Hall, located at the following address:

Department of Elections  
1 Dr. Carlton B. Goodlett Place  
City Hall, Room 48  
San Francisco, CA 94102-4608

The Designated CPUs are the Database and Application Servers listed in Appendix E.

#### **2. Installation and Project Management**

The Contractor shall install, integrate and test the Licensed Software at a date and time designated by the Department. The Contractor shall provide a Project Manager and adequate personnel to complete these tasks.

Prior to beginning installation, the Contractor shall provide the Department with a detailed installation plan, subject to Department review and approval. This plan shall include:

- a) An illustrative installation work plan, indicating which tasks are the responsibility of the Department and which are the responsibility of the Contractor, and which defines the responsibilities assigned to the Contractor's personnel.
- b) A description of each task and the number of person days required.
- c) A proposed, detailed timetable on all aspects of the installation, including the review of data tables, hardware implementation, training, system testing, etc.
- d) A listing of all stakeholder meetings required for implementation for such areas as the design of menu screens, designing reports and forms, pre-installation tasks, etc.

The Contractor shall notify the City in writing when the Licensed Software is installed. The City shall then verify whether it is able to log into the Licensed Software and perform maintenance and look-up functions on its core databases. When the City is able to log in and perform these functions, the City shall notify the Contractor in writing that installation is complete.

#### **3. Acceptance Testing**

The Contractor shall develop an Acceptance Testing Plan of the Licensed Software, subject to the review and approval of the City. Once the Acceptance Testing Plan is completed, the Contractor shall test the Licensed Software to ensure that it performs to the specifications detailed in this Agreement. The Contractor's testing is subject to review and acceptance or rejection by the City. The Contractor shall assign a Project Manager to direct all aspects of the implementation of the Licensed Software for the Department.

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After installation of the Licensed Software is complete, the City shall give the Contractor at least seven (7) days advance notice that Contractor should be ready to begin work on a designated Start Date.

The Contractor shall prepare an Acceptance Testing Plan, consisting of written test descriptions for each functional area in Appendix A, to be followed by the Contractor and Department for each phase of the acceptance testing. The Contractor shall provide the completed Plan to the City within seven (7) days of the Start Date. Upon receipt of the Plan, the City shall have seven (7) days to review the work and give notice to the Contractor of the City's acceptance or rejection. If the City rejects the Plan, its notice to the Contractor shall specify the reasons leading to rejection. The Contractor shall then have seven (7) days to correct and resubmit the Plan. Following correction and resubmission, the City shall have seven (7) days to review the corrected Plan and give notice to the Contractor of the City's acceptance or rejection.

#### **Phase 1**

Phase 1 shall include the testing of all functions of the Licensed Software described in Appendix A other than the ICR/OCR functions described in Appendix A, Section 6. Phase 1 shall begin upon the City's acceptance of the Acceptance Testing Plan set forth above. The Contractor shall complete Phase 1 testing within forty-two (42) days. At the completion of Phase 1 testing, Contractor shall provide to City written performance descriptions for each functional area tested in Phase 1, in addition to any other documentation specified by the Acceptance Testing Plan. Following the Contractor's delivery of this work, the City shall have seven (7) days to review the completed work and give notice to the Contractor of the City's acceptance or rejection of the completed work. If the City rejects the completed work, it shall notify Contractor of errors leading to the rejection. The Contractor shall then have seven (7) days to correct errors and resubmit the work specified for Phase 1. Following error correction and resubmission by Contractor, the City shall have seven (7) days to review the corrected work and give notice to Contractor of City's acceptance or rejection of the corrected work.

#### **Phase 2**

Phase 2 shall include the testing of the ICR/OCR functions described in Appendix A, Section 6. Phase 2 shall begin upon the City's acceptance of Phase 1 work. The Contractor shall complete Phase 2 testing within fourteen (14) days. At the completion of Phase 2 testing, Contractor shall provide to City written performance descriptions for each functional area tested in Phase 2, in addition to any other documentation specified by the Acceptance Testing Plan. Following the Contractor's delivery of this work, the City shall have seven (7) days to review the completed work and give notice to the Contractor of the City's acceptance or rejection of the completed work. If the City rejects the completed work, it shall notify Contractor of errors leading to the rejection. The Contractor shall then have seven (7) days to correct errors and resubmit the work specified for Phase 2. Following error correction and resubmission by Contractor, the City shall have seven (7) days to review the corrected work and give notice to Contractor of City's acceptance or rejection of the corrected work.

In addition to and in conjunction with the services described above, the Contractor shall:

- a) Fully integrate the Licensed Software, including but not limited to integration of all network components;

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- b) Ensure that all hardware and software elements of the Licensed Software are operating according to the Contractor's specifications and the requirements of the Agreement and appendices;
- c) Prepare all testing material and devices;
- d) Incorporate existing Department data and tables into the Licensed Software ;
- e) Transmit voter registration information to the California Secretary of State for verification; and
- f) Verify and confirm in writing to the Department that the Licensed Software performs in accordance with the Secretary of State's statewide database.

Subject to Section 7 of this Agreement, and notwithstanding the cumulative time allowed for the steps of the acceptance testing set forth above, the Contractor shall have 90 days from the completion of installation of the Licensed Software to obtain the City's acceptance of the completed acceptance testing.

#### **4. Training of Department Personnel**

The Contractor must provide Department staff comprehensive training in all hardware, software, testing, operation, and maintenance elements of the Licensed Software.

The Contractor shall provide the Department with training materials prior to the Contractor initiating training of the Department's personnel. These materials shall include a syllabus that provides a listing of topics covered at each training session, the dates and times of each session, and the materials that the Department must provide for the training sessions. The Department shall designate personnel who will require training sufficient to manage the Licensed Software for the Department and who will perform the technical maintenance of the Licensed Software and who will be responsible for customizing the system annotation and assigning security passwords and levels of access. The Contractor shall also provide training without cost to the Department whenever employee turnover requires new personnel to manage the Licensed Software for the Department and who may not have experience using and managing the Licensed Software.

Training of Department staff shall include, but not be limited to: Licensed Software implementation; Licensed Software operation; voter registration processes; precinct worker information; polling place information; reprecincting, redistricting, and GIS mapping operations; candidate filing processes; petition processing; and vote-by-mail processes. The Department shall, in its sole discretion, identify its personnel for this training. The Contractor shall provide this training during the first year of the Agreement, prior to the first election following the effective date of the Agreement, and shall provide upon the Department's request training support throughout the term of the Agreement.

#### **Materials**

The Contractor shall:

- a) develop and document vote-by-mail and early voting procedures and logistics (e.g., issuing ballots, printing labels, signature verification);
- b) develop and document provisional voting procedures;
- c) develop and document troubleshooting procedures; and,
- d) document all maintenance of the Licensed Software.

#### **Operational Training**

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The Contractor, under the supervision of the Department, shall plan and provide training on all aspects of the operation of the Licensed Software. This training shall include, but not be limited to, the operation of:

- a) ancillary equipment that is part of the Licensed Software;
- b) election production and preparation systems;
- c) elections data and transmission of this data to the Secretary of State;
- d) systems for production of reports; and
- e) on-line help features.

#### **Election Production Training**

The Contractor shall train Department staff in election production, including, but not limited to, the following:

- a) ballot styles;
- b) election-specific database preparation;
- c) election coding;
- d) transmission of database information to the Secretary of State; and
- e) production of reports.

#### **5. Improvements, Usability and Written Procedures**

The Contractor shall be responsive and accommodating to the Department's requests for proposed system improvements. The Contractor will work with the Department in a responsive, timely and comprehensive manner to continue to improve the usability and accessibility of the Licensed Software to the satisfaction of the Department for voters and staff during the term of the Agreement, including but not limited to, clear user instructions, improved effective screen presentations, improvements of any ballot editing features, improved visual cues for users, improved auditory interactions, improved physical accessibility and manipulability.

The Contractor shall provide the Department with procedures that users can refer to when operating the Licensed Software. The procedures shall include reference information for personnel performing routine data processing, i.e., a front-end user manual. The Contractor shall provide the procedures in both hard copy and in electronic formats. If the Contractor posts such procedures on the Internet and continuously updates this information, the Contractor is not required to provide hard copy and electronic versions of this information to the Department, but must instead provide access to these online procedures and notify the Department of any online updates.

The Contractor shall provide the most current version(s) of the procedures set forth above at the conclusion of Acceptance Testing.

#### **6. System Documentation**

The Contractor shall supply all material required to operate and maintain the Licensed Software and any modifications thereto, through the term of the Agreement. Support material will include the following documentation:

- a) a System Hardware specification that includes performance and design standards and

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compatibility requirements, equipment interface requirements, and a description of the System operating environment;

- b) a System Software specification that includes specifications for the System operating environment and interface between hardware components, software components and operator/user functions, and software test and verification specifications;
- c) a Systems operations manual that describes the System's hardware and application software components, operational features and procedures for invoking them, and the support resources required to sustain System operation; and
- d) System maintenance procedures that identify all maintenance and repair operations that can be performed by Department staff, with the procedures required to trouble-shoot malfunctions for fault detection, fault isolation, equipment alignment or adjustment, and removal and replacement of failed components.

The Contractor shall update these procedures when necessary, provide written updates to the Department, and train Department staff concerning the updated procedures.

The Contractor shall provide the most current version(s) of the system documentation set forth above at the conclusion of Acceptance Testing.