

Oregon Parks and Recreation Commission

September 2023

Agenda Item: 6g

Action

Public Comment Allowed: Yes

Topic: **Outdoor Recreation Solution Project
Human-Centered Design and Accessibility Consultants
Procurement 8504, Amendment 4**

Presented by: **Frank Smith, Assistant Director – IT Special Projects Manager**

Background:

The Outdoor Recreation Solution project requests approval of an amendment to a contract that will exceed \$750,000. The amended contract will continue the services of Anthro-tech, which continues to provide User Experience (UE), User Interface (UI), and accessibility Subject Matter Expertise (SME) for the Outdoor Recreation Solution Project. Amendment 4 will ensure Anthro-tech continues its role as an SME and assists OPRD in focusing on the continued improvement of User Experience (UE) and accessibility through the remainder of the vendor selection phase and into the project's next phase.

The Amendment covers the following areas as the project completes the Vendor evaluation phase and moves into the implementation phase:

- Vendor Evaluation
- UX Research and Evaluation
- Information Architecture
- Content Creation
- Training
- Governance
- Organizational Change Management

The additional cost of services in Amendment 4 is not to exceed \$387,190.

Prior Action by Commission: None

Action Requested: Approval

Attachments: HB 2375 8504 Amendment 4 – signed.pdf

Prepared by: Frank Smith, Assistant Director – IT Special Projects Manager

Contract Verification Form (HB2375)

Contract #: Amendment 4 to OPRD Contract 8504


Contract Title: UX (User Experience) Consultant

Before execution or amendment of a Public Contract exceeding \$150,000, the Director shall review all the Department of Administrative Services (DAS), the Department of Justice (DOJ), or other legal counsel advice submitted for this Contract, and verify that the Contract Administrator has read and understands all advice and recommendations that DAS, DOJ, or other legal counsel have given.

Contract Administrator's Representation

I certify that I am the Contract Administrator for the referenced contract, and that I have read and understood the advice and recommendations provided by DOJ, DAS, or other legal counsel with respect to this contract and the associated procurement.

Contract Administrator:


Frank Smith (Aug 17, 2023 08:17 PDT)

Asst Dir - IT Spec. Proj. Mgr. 08/17/23

Name

Title

Date

Review and verification by Director or delegate

I certify that I have reviewed and verified that the attached advice and recommendations provided by DOJ, DAS, or other legal counsel with respect to this contract, and the associated procurement, have been understood by the Contract Administrator.

Director (or delegate):

Name

Title

Date

A signed copy of this verification and review must be retained in the procurement file

This review is required by ORS 279A.161

OPRD-CS Advice

(for HB2375 compliance)

OPRD Procurement Services advice

- Contract Administration Duties attached.

DOJ AAG advice

- No material advice from DOJ, 08/11/2023. See DOJ's legal sufficiency approval email attachment on page 5.

Contract Administration duties

for Price Agreements and Contracts issued by OPRD

Responsibility	OPRD - CS	Contract Administrator
1. Provide procurement advice to the agency CA regarding the procurement process.	X	
2. Collect and discuss procurement advice from DOJ and OPRD with agency director prior to contract execution.	X	
3. Identify contract administrator in writing	X	
4. Debrief awarded contractor		
a. Make sure that contractor understands technical requirements of contract		X
b. Clarify rights/responsibilities of both parties		
c. Address any special contract provisions		
5. Draft justifications and determinations as required by administrative rule for solicitation and / or contract actions.		X
6. Monitor quality of goods or service according to contract terms and conditions.		X
7. Monitor schedules, milestones, and dates when certain activities will be completed (delays).		X
8. Conduct inspections and acceptance / denial of goods or services and review contract / delivery / task order deliverables and accept or reject as appropriate.		X
9. Negotiate terms of contract change orders and work orders.		X
10. Negotiate terms of amendments.		
11. Initiate and draft contract change orders, work orders and amendments to the contract for processing and to Contract Specialist (via OPRIS).		X
12. Process and execute contract change orders, work orders and amendments.	X	
13. Manage day-to-day communications and performance with contractor to ensure goods or services are rendered in accordance with contract. Provide technical direction to the contractor and recommend corrective actions.		X
14. Manage any formal conflicts between contractor and agency, to include:		
a. Contractor performance issues / disputes		X
b. Contractor / state terminations		
c. Contractor / state defaults		

15. Review invoices for appropriateness of costs and provide recommendations to facilitate certification of the invoice in accordance with the contract and the state of Oregon and agency policies / procedures.		X
16. Monitor budget and make payments in accordance with the contract and the state of Oregon and agency policies and procedures.		X
17. Maintain master contract file, including advice given from DOJ.	X	
18. Provide advice on the application of contract terms and conditions.	X	
19. Provide advice on the application and interpretation of DAS/DOJ administrative rule.	X	

Attach Legal Sufficiency Approval (e-mail) from DOJ



Fri 8/11/2023 12:35 PM

McCormick John <John.McCormick@doj.state.or.us>

FW: Matter 634900-GF0673-23 Legal Sufficiency Review: OPRS UX Consultant Contract 8504 Amendment 4

To: HOUSE Nameun * OPRD
Cc: Cook Suzanne; Shipsey Steven; SMITH Frank * OPRD
 You replied to this message on 8/11/2023 1:29 PM.
This message was sent with High importance.



Good afternoon Nameun. Thanks for your patience and the prompt.

I don't have any comments to the amendment.

I approve for legal sufficiency, in the form attached, Amendment No. 4 to OPRD Contract No. 8504 with Anthro-Tech, Inc.

Please let me know if you would like to discuss.

Thanks

John

John McCormick
Attorney-in-Charge | Business Transactions Section | General Counsel Division
Oregon Department of Justice
1162 Court Street NE, Salem OR 97301
503.480.6584
he/him/his

AMENDMENT 4
to
STATE OF OREGON
Contract for Services 8504
UX (User Experience) Consultant

This is Amendment No.4 (“Amendment”) to the Contract No. **8504**, dated **September 6, 2019**, as amended from time to time (“Contract”) between the State of Oregon, acting by and through its Oregon Parks and Recreation Department (“OPRD” or “Agency”) and Anthro-Tech, Inc., a Washington corporation (“Contractor”). This Amendment is effective on the date signed by all parties and upon receipt of all approvals necessary for signing (“Amendment Effective Date”).

RECITALS

The purpose of Amendment No. 4 is to increase the Not to Exceed amount and revise Statement of Work in Exhibit A.

NOW, THEREFORE:

In consideration of the foregoing and the mutual promises set forth herein, OPRD and Contractor agree to amend the Contract as follows:

1. Section 4.1, Not to Exceed Compensation, is hereby deleted and replaced in its entirety with the following:

4.1. **Not to Exceed Compensation.** The maximum compensation payable to Contractor under this Contract, which includes any allowable expenses, is **One Million, Three Hundred and Ninety-Four Thousand, Six Hundred and Ninety Five dollars (\$1,394,695)** ~~One Million, Seven Thousand, Five Hundred Five dollars (\$1,007,505)~~ (the “Maximum Price”). The Maximum Price is applicable only to the “Phase 1” and “Phase 2” activities, as identified within the attached Exhibit A, and does not apply to any additional Services. The allocation of the Maximum Price among tasks and Deliverables in each of Phase 1 and Phase 2 is more fully described in the Statement of Work. Contractor's compensation for Services rendered in Phase 1 shall be based on Contractor's hourly rates as set forth in Section 4.2. Contractor’s compensation for Services rendered in Phase 2 will be at the rates set forth in the Statement of Work. Agency will not pay Contractor any amount in excess of the Maximum Price of this Contract, and will not pay for Services performed before the Effective Date or after the expiration or termination of this Contract. If the Maximum Price is increased by amendment of this Contract, the amendment must be fully effective before Contractor performs Services subject to the amendment.

2. Revise Tasks in Phase 2 in Exhibit A Statement of Work, which is attached to this Amendment in its entirety and incorporated into this contract.

Except as expressly amended above, all other terms and conditions of Contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the Contract are true and correct as of the Amendment Effective Date and with the same effect as though made at the time of this Contract.


Certification:

Any individual signing on behalf of Contractor has the authority and knowledge to make the following certifications, and hereby certifies under penalty of perjury:

- a. the number set forth in the contract is Contractor’s correct taxpayer identification number;
- b. Contractor is not subject to backup withholding because:
 - i. Contractor is exempt from backup withholding;
 - ii. Contractor has not been notified by the IRS that Contractor is subject to backup withholding as a result of a failure to report all interest or dividends; or
 - iii. the IRS has notified Contractor that Contractor is no longer subject to backup withholding.
- c. for a period of no fewer than six calendar years preceding the Amendment Effective Date, Contractor has faithfully complied with and is not in violation of:
 - i. all tax laws of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318; and
 - ii. any tax provisions imposed by a political subdivision of this state that applied to Contractor, to Contractor’s property, operations, receipts, or income, or to Contractor’s performance of or compensation for any work performed by Contractor; and
 - iii. any tax provisions imposed by a political subdivision of this state that applied to Contractor, or to goods, services, or property, whether tangible or intangible, provided by Contractor; and
 - iv. any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.
- d. in the event that Contractor is a general partnership or joint venture, that Contractor signature(s) on this Amendment constitute certifications to the above statements pertaining to the partnership or joint venture, as well as certifications of the above statements as to any general partner or joint venturer signing this Amendment.

In witness whereof, the Parties hereto have made, executed and delivered the Contract as of the last date each signatory below has signed the Contract.

Anthro-Tech, Inc. (Contractor)

By: 

Suzanne Boyd, Founder & CEO

08/16/23

Date

State of Oregon acting by and through its Oregon Parks and Recreation Department (OPRD)

By: _____

Lisa Sumption, Director

Date

Approved for legal sufficiency by John McCormick, AAG, by email dated August 11th, 2023.

Approved for expenditure over \$750,000 by Oregon Parks and Recreation Commission on _____.

Attachment: Exhibit A Statement of Work

Exhibit A

Statement of Work

[This Exhibit A is effective upon execution of Amendment 4 to OPRD Contract 8504. New language is indicated by **underlining and bold** and deleted language is indicated by ~~strikethrough~~]

1. OPRD OUTDOOR RECREATION SOLUTION PROJECT

Contractor shall provide consulting services related to UX (user experience) in support of OPRD's Outdoor Recreation Solution Project Team. This Statement of Work sets forth the tasks and Deliverables Contractor will complete in Phases 1, and 2 of Services related to the OPRD' Outdoor Recreation Solution Project (the "Project") the Statement of Work.

TASKS

PHASE 1 [Completed within Project Timeline specified in Exhibit A]

A. UX (user experience) and UI (user interface) requirements gathering.

Task Overview. Contractor shall utilize their expertise in the areas of UX/UI to help OPRD develop requirements specific to the goal of designing and implementing OPRD's Outdoor Recreation Solution in replacement of its current reservation system for improved user experience and services. These requirements will include both the public facing application and the back-end application utilized by OPRD's field personnel. The requirement gathering process will include the initial determination of the requirements and the progressive elaboration of those requirements through all phases of the Project. Given Contractor's expertise in UX/UI, OPRD expects Contractor to provide guidance in areas that OPRD may not have identified or considered.

Contractor's Approach. Contractor shall:

- Document current (as is) UX and UI requirements of the existing system.
- Gather information about how well the current (as is) UX and UI support the user experience either through expert UX review of the system, or more formal user research approaches (usability testing, focus groups, user surveys).
- Design and facilitate UX requirements sessions with various stakeholders (IT staff, engineers, communication staff, customer support staff) and customers to capture future state requirements.
- Abstract UX and UI requirements from like systems based on market analysis outcomes obtained in Task B.
- Capture UX and UI requirements in comprehensive requirements document organized by global UX/UI requirements and user scenarios (top tasks) requirements developed jointly by Agency and Contractor. UX/UI requirements cover topics such as features, navigation, information architecture, system behavior, terminology, accessibility, error handling, mobile responsive design and other elements.
- Vet requirements with stakeholders, including developers, business analysts, and solution architects.
- Prioritize UX/UI requirements as per approved scale which can be something simple such as required vs. desirable requirements or a weighted scale.

B. Market Analysis.

Task Overview. Contractor shall review the reservation industry and determine the best practices currently being utilized in relation to UX (user experience) and UI (user interface), and how best to leverage those practices in a new reservation system; keeping in mind that the new reservation system will not be a 100% customized solution. Contractor shall provide a future state blueprint, in accordance with the established best practices, that will be included in project planning documentation. OPRD recognizes its limited expertise in

UX/UI and encourages Contractor to supply UX (user experience) and/or UI (user interface) design suggestions in line with OPRD branding requirements and workflow improvements based upon best practices that OPRD may not have considered.

Contractor's Approach. Contractor shall:

- Work with OPRD to identify a list of peer organizations and solutions, to include:
 - Other parks and recreation reservation systems
 - Comparable solutions in other industries such as Airbnb and other lodging providers, rental car companies, etc.
- Conduct peer landscape review of other reservation systems to identify UX and UI best practices and how best to leverage those practices in the new Reservation System
- Identify gaps in tools or features needed to support the future state. Prioritize improvements and new features.
- Develop a future state blueprint to ensure that the recommended future state leverages what works well about the current system and incorporates improvements and desired new features based upon the market analysis.

C. Usability study.

Task Overview. Contractor shall create a current state assessment of OPRD's reservation/booking system to gather information on all aspects of the customer experience. This assessment will help determine the parts of the current system the public facing users find most appealing, identify those areas that pose the biggest hindrance, and contribute to identification of those areas where updates in technology can improve the overall user experience. Creation of the current state evaluation should involve public testing or focus groups which will be determined based upon user data provided by OPRD and in environments representative of the diverse geographic areas in which OPRD conducts business.

Contractor's Approach. Contractor shall:

- Analyze existing customer data from customer support representatives, web and search analytics and any customer feedback forms to understand customer behaviors, concerns and unmet needs.
- Design and conduct a moderated remote baseline usability study of the existing Reservation System with 16 representative customers in order to:
 - Gather data on how well the site supports users and their top tasks.
 - Collect baseline performance and perception data (efficiency, effectiveness, satisfaction, learnability) to measure progress as changes are made to make the system easier to use.
 - Determine what is working well about the current UX/UI, what needs improvement and why.
- Analyze the quantitative and qualitative data from the baseline study, documenting trends in user experience issues.
- Prioritize short and long-term design recommendations to improve usability and user experience.
- Assess priorities for the redesign and what areas (requirements, features) are most important to focus on, including new features, information architecture, content, navigation, design and layout.
- Conduct an ideation workshop with OPRD stakeholders to both:
 - Abstract new requirements based on a solid understanding of the current's systems biggest usability problems and opportunities, as well as what is working well.
 - Design a low-fidelity UX prototype (using paper and basic office supplies) to show a future direction for the new Outdoor Recreation Solution System.

D. Scope Development.

Task Overview. Throughout the Project, Contractor shall fill the role of SME (Subject Matter Expert) in the areas of UX (user experience) and UI (user interface). In this role, Contractor shall determine and recommend

to OPRD the best ways to incorporate the UX/UI work product from requirements gathering, current state analysis, and future state analysis into the overall scope of the Project. This will include the initial Project scope creation and participating in change management during the evolution of Project.

Contractor's Approach. Contractor shall:

- Help set the scope for the UI/UX work for the Project based on the requirements gathering. Work will include a proposed roadmap for following the user-centered design process that outlines UX and UI activities, and deliverables such as prototyping, usability testing, UX design system, and accessibility audits. This roadmap can be used to inform any procurement documents the Project may need to identify and select a COTS solution provider.
- Assist OPRD in developing language needed for the RFP to clearly communicate expectations for UX/UI requirements and approach/process for integration UX and accessibility features generally consistent with generally accepted accessibility standards (e.g., Rehabilitation Act Section 508 standards, or Web Content Accessibility Guidelines (WCAG)) in the software development process.
- Serve as the UX and UI subject matter expert throughout the Project, including review of provided UX deliverables.
- Provide a presentation to the Project team at the upcoming Project team meeting in September 2019. The presentation should address the importance of UX/UI, the user-centered design process and common methods, and the roadmap for the Project.

PHASE 2

A. Discovery and Planning

Task Overview. Contractor shall initiate a kick-off meeting and follow-up onboarding activities. Contractor will work in partnership with OPRD's team to gain alignment on the current state of the Project, including changes to the Project team, scope, goals, requirements, and processes.

B. Vendor Evaluation

Task Overview. Contractor shall utilize their expertise in the areas of UX/UI to help OPRD finalize RFP evaluation criteria and evaluate vendors who respond to OPRD's RFP for an Oregon State Parks Recreation Outdoor Recreation Solution System (the "RFP"). The evaluation process will include three bodies of work: proposal evaluations, demo evaluation, and sandbox evaluation (each as described in more detail in the RFP. During each of these phases, Contractor will provide UX and accessibility criteria to OPRD that will be included in the RFP and used by the evaluation team to support the evaluation team's assessment of selected vendor's stated and demonstrated capabilities. Contractor will utilize its expertise in UX/UI to provide guidance in areas related to evaluation criteria that OPRD or the evaluation team may not have identified or considered. Once a vendor is selected, Contractor will begin a process of roadmap reevaluation, to ensure that future tasks continue to align with Project needs.

Contractor's Approach. Contractor shall:

- Assist OPRD in finalizing RFP language
- Provide UX and accessibility evaluation criteria for inclusion in the RFP for proposal evaluation
- Support proposal review process with UX and accessibility expertise
- Write UX and accessibility tasks for demonstration scripts, in collaboration with OPRD
- Write UX and accessibility evaluation criteria for demo evaluation, in collaboration with OPRD

- Support OPRD team in developing criteria for staff evaluations of the sandbox with accessibility and UX expertise
- Write scripts for Sandbox UX and accessibility review readiness check for public-facing and staff-facing studies
 - Write criteria for readiness check evaluation
 - Perform readiness check
- Public-facing vendor sandbox study
 - Design and conduct ~~one~~ two moderated remote usability studies of the public-facing interface for up to two vendor-provided sandbox systems. Sessions will be 1-hour. Participants will be 8-12 representative customers per study, including people with disabilities. Research will:
 - Gather data on how well the system supports users and their top tasks.
 - Determine where the vendor succeeds and fails to meet the RFP requirements in about the system UX/UI.
 - Collect baseline performance and perception data (efficiency, effectiveness, satisfaction, learnability) to provide a starting point to measure progress for the selected system as changes are made to make the system easier to use.
 - Analyze the quantitative and qualitative data from the study, highlighting trends in user experience issues for comparison between systems.
- Staff-facing vendor sandbox study
 - Design and conduct ~~one~~ two moderated usability studies of the staff-facing interface for up to two vendor-provided sandbox systems. Sessions will be 1-hour. Participants will be 8-10 representative staff members per study. Recruitment will strive to include staff members with disabilities. Research will:
 - Gather data on how well the system supports users and their top tasks.
 - Determine where the vendor succeeds or fails to meet the RFP requirements related to the system UX/UI.
 - Collect baseline performance and perception data (efficiency, effectiveness, satisfaction, learnability) to provide a starting point to measure progress for the selected system as changes are made to make the system easier to use.
 - Analyze the quantitative and qualitative data from the study, highlighting trends in user experience issues for comparison between systems.
 - Lead the process to revisit the roadmap completed in Phase 1 of this Statement of Work once a vendor is selected, to ensure that the roadmap tasks match the needs and capacity of the selected system and team.
- Content Evaluation
 - Develop a scoring mechanism for evaluating vendor's capability to implement page types.
 - Assess ability of vendor to implement a single page type.

- Assess ease of OPRD content team in filling out content.
- Assist OPRD team in expert review of page implementation and functionality.
- Develop a scoring mechanism for evaluating the vendor's capability to implement the taxonomy.
- Work with vendor to implement high levels of information architecture (sample navigation and L2 pages if vendor is open to customizations).
- Work with vendor to implement taxonomy and filter page (if vendor is open to customizations).
- Support OPRD in expert review of taxonomy functionality.

C. UX Research and Evaluation

Task Overview. In Phase 2, UX Research will include four bodies of work: Google analytics data analysis, a customer survey, customer personas, and diagnostic usability studies of the evolving design to find and fix any usability issues early. Based on the foundation of research from Phase 1, these activities will begin the iterative UX/UI design process.

Contractor's Approach. Contractor shall:

- a. Analyze Google Analytics data to understand the user traffic patterns between OPRD's existing .org, .gov, and reservation sites.
- b. Conduct a customer survey to understand customer groups, their characteristics, top goals and tasks, unmet needs and expectations.
- c. Analyze survey data, conduct customer group segmentation, and develop customer personas to be used as a reference point in all phases of the design process for the new system.
- d. Review existing data, facilitate a workshop to identify what's missing, conduct additional research as needed, and develop aspirational customer personas to be used as a reference point in all phases of the design process for the new system.
- e. Review existing data, conduct additional research, design and facilitate a workshop to build internal capacity in creating data-driven personas, and revise the internal personas to align with customer personas to be used as a reference point in all phases of the design process for the new system.
- ~~f.~~ f. Design and conduct moderated usability study for staff-facing UX concepts. Participants will be 8-10 representative staff members. Recruitment will strive to include staff members with disabilities. Research will:
 - i. Determine the success of the recommendations demonstrated in the UX concept as outlined in task C to meet user needs and
 - ii. Gather data to support more refined and data-driven design recommendations.
- ~~e.~~ g. Design and conduct moderated remote usability study for customer-facing UX concepts. Participants will be 8-12 representative customers, including people with disabilities. Research will:
 - iii. Determine the success of the recommendations demonstrated in the UX concepts as outlined in task C to meet user needs and

- iv. Gather data to support more refined and data-driven design recommendations.

D. UX Design

Task Overview. UX design is an iterative process that proposes and ensures findings from research and user centered design best practices are incorporated into the system throughout the Project. Throughout the Project, UX Design will include four main bodies of work: definition, ideation, refinement, and collaboration. Contractor's exact tasks during UX design will depend on the capabilities and limitations of the selected systems and OPRD and Contractor will evaluate and specify the specific contractor tasks, based on those described below, once OPRD selects the vendor to implement the system. Phase 2 activities focus on defining the scope and focus of the design process and beginning to draft design concepts for usability testing.

Contractor's Approach. Contractor shall:

- a. Assist OPRD with a digital style guide workshop to generate ideas and find consensus on brand values.
- b. Based on the results of the digital style guide workshop, assist OPRD with the development of a digital style guide focusing specifically on elements that are necessary for inclusion or implementation in the new Outdoor Recreation Solution system.
- c. Based on the limitations of the selected system, as demonstrated in the sandbox for that system, assist OPRD in refining the digital style guide for leadership approval.
- d. Employ a UX problem setting process to define scope and focus the design process, informed by past research and demo evaluation findings.
- e. Create UX concepts for both staff- and public-facing user experiences, for use in the first round of usability testing with designs.
- f. Apply accessibility annotations to UX concepts, ensuring that an accessibility focus is included early in the design process.
- g. Begin documentation of the Design System that will guide a cohesive system of design and interactions.

E. Taxonomy

Task Overview. Contractor shall develop a taxonomy of terms used in the new system. The development will include three bodies of work: discovery and drafting, design, and governance. Phase 2 activities will include discovery and drafting. In discovery, activities will focus on understanding the requirements of the business and users, and the collection of content to be indexed. Contractor shall develop and deliver a low fidelity "draft" taxonomy from these findings, which OPRD will use until the opportunities and constraints of the selected system are more clearly understood. This will allow Project teams to begin work on the core structures that will provide a foundation for detailed design work in the next phase and allow OPRD to test those foundations with users prior to committing to them in detail.

Contractor's Approach. Contractor shall:

- Perform a combination of subject matter interviews, user interviews, workshops, and reviewing existing data to:

- Identify use cases that are, could be, or should be supported by controlled vocabulary
- Identify existing functional and business requirements; and
- Identify and collect existing controlled vocabularies (official and unofficial).
- Analyze existing site content for additional term candidates.
- Analyze search logs within the existing reservation system for additional term candidates.
- Create initial, draft fidelity taxonomies in a simple spreadsheet format to respond to functional and business requirements as understood prior to OPRD's selection of the new Outdoor Recreation Solution system vendor.
- Test draft taxonomy with end users (online card sort) to evaluate its alignment with users' mental models in the context of key use cases.

F. Information Architecture

Task Overview. Contractor will develop an information architecture approach for the public-facing Outdoor Recreation Solution system. The development will include four bodies of work: assessment, design, iteration, and maintenance. Phase 2 activities will focus on assessment and initial design.

Contractor's Approach. Contractor shall:

- a. Perform content inventory and sampled content audit to gather data on the current state of the information architecture.
- b. Perform a current state analysis of existing IA of the existing reservations application, as well as the OPRD gov. web site and oregonstateparks.org.
- c. Design, facilitate and analyze a tree test study for the new public-facing system, to uncover customers' mental models, preferred grouping of content, and labelling for a new IA.
- d. Develop a new information architecture draft for the future Outdoor Recreation Solution system, to be used in UX design concepts and iterated through usability testing.
- e. Content Modelling
 - a. Conduct a core model workshop with key content contributors from each system and subject matter experts when applicable (maximum 8 people).
 - b. Create content wireframes/sketches to inform design (assumes 10 page types plus alerts).
 - c. Create content development requirements.

G. Content Creation

Task Overview. Quality content is key to the long-term success of the Project because it greatly impacts the accessibility and usability of the Outdoor Recreation Solution system. Phase 2 includes evaluation and early creation activities for content that will exist in the selected system.

Contractor's Approach. Contractor shall:

- Serve in an advisory capacity for OPRD content creators, with a specific emphasis on system content such as labels, error messaging, alerts, and instructions.

H. Training

Task Overview. The training portion of the work will be broken down into two main bodies of work: workshops and ongoing training. In Phase 2, Contractor will provide training in writing for the web and provide accessibility workshops for content creators.

Contractor's Approach. Contractor shall:

- Conduct a "writing for the web" workshop for up to 20 OPRD content creators to ensure that OPRD staff who will be writing content are familiar with how to write specifically for the web.
- Conduct an accessibility workshop for up to 20 OPRD content creators to ensure that OPRD staff who are contributing web content understand content accessibility best practices and applicable WCAG standards.

I. Governance

Task Overview. The Project governance structure provides guidance with respect to ongoing decision making and oversight through launch of the system and beyond. In Phase 2, OPRD will begin to develop governance policies and procedures.

Contractor's Approach. Contractor shall:

- Facilitate a governance policies and procedures workshop designed to generate appropriate policies and procedures based on generally accepted governance practices to define how OPRD will manage and support the new system over time.

J. Change Management

Task Overview. Change management moves Oregon Parks employees and other stakeholders (people who are affected or have an interest or stake in the change) through the various stages of awareness, adoption, and advocacy for human-centered design (HCD) as the process to redesign the reservation portal.

This includes setting a vision for the new system and broadly communicating how user research and customer input is driving design decisions via multiple communication channels and approach.

Organizational change management provides regular Project updates to key stakeholders, gives them a voice during the design process, and ensures stakeholder buy-in for the changes to the system.

Contractor's Approach. Contractor shall:

- Review existing stakeholder map and key informant interview findings
- Interview 5-7 new stakeholders
- Stakeholder Analysis: Identify stakeholders, factions, or other groups who are critical to making progress on the change. Assess values, loyalties, and losses.
- Update the stakeholder map
- Create a Strategic Communications Plan: Document the vision statement, goals, messages, target audiences, tactics, measurements of success, and approach to move the organization through the stages of awareness, adoption, and advocacy for the change.

- Provide ongoing change management support, such as developing a vision for the customer experience, drafting strategic communications and presentations for the steering committee and stakeholder groups, maintaining the stakeholder mapping and communications plan, developing and maintaining the all-staff dashboard, conducting periodic surveys, and coaching.

K. Project Management, Consulting Services

Task Overview. Projects with multiple activity streams and consultants will require dedicated project management.

Contractor’s Approach. Contractor shall:

- Track the Project, roles and responsibilities, budgets, work streams, timelines, milestones, meetings, and collaboration needs related to Contractor’s obligations under this Statement of Work.
- Provide subject matter consulting in UX research and design, including preparing and presenting core team, all staff and executive presentations, sharing the results of usability studies, user research, accessibility reviews.

KEY PERSONS, DELIVERABLES, AND COSTS

PHASE 1

A. UX (user experience) and UI (user interface) requirements.

Key Persons:

Suzanne Boyd, Client Engagement Director
 Camy Naasz, Senior User-Centered Design Consultant, Project Lead
 Kristina Rakestraw, UX Designer
 Beth Somerfield, Project Manager and Digital Accessibility Expert

Tasks:	Hourly Rate	Hours	Total
Document current UX/UI Requirements –existing system	\$185	20	\$3,700
Conduct expert UX/UI review	\$185	25	\$4,625
Design UX/UI requirements sessions	\$185	20	\$3,700
Facilitate UX/UI requirements sessions	\$185	30	\$5,550
Note taking – UX/UI requirements sessions	\$155	30	\$4,650
Abstract UX/UI requirements from market analysis	\$185	20	\$3,700
Capture UX/UI requirements	\$185	35	\$6,475
Vet UX/UI requirements with stakeholders	\$185	30	\$5,550
Prioritize UX/UI requirements	\$185	20	\$3,700
Project management	\$135	61	\$8,235
Total for Task A			\$49,885

Deliverables:

- Current system UX/UI requirements
- Report of findings from the expert UX/UI review

- Prioritized and approved UX/UI requirements for the new system (based on SME requirement sessions, market analysis, usability study, and UX/UI expert review). UX/UI requirements cover topics such as features, navigation, information architecture, system behavior, terminology, accessibility, error handling, mobile responsive design and other elements. They are prioritized based on a mutually agreed upon scale.
- Project management deliverables: agendas, status reports, presentations, meeting minutes, collaboration site, core team meetings and other deliverables focused on educating and evangelizing the importance of UX/UI.

B. Market Analysis

Key Persons.

Suzanne Boyd, Client Engagement Director
 Camy Naasz, Senior User-Centered Design Consultant, Project Lead
 Kristina Rakestraw, UX Designer
 Misty Weaver, Content Strategist
 Beth Somerfield, Project Manager and Digital Accessibility Expert

Tasks:	Hourly Rate	Hours	Total
Design, conduct, and analyze peer landscape review	\$185	40	\$7,400
Develop future state blueprint	\$185	30	\$5,550
Project management	\$135	19	\$2,565
Analyze Reserve America (https://www.reserveamerica.com/)	\$185	15	\$2,775
Total for Task B			\$18,290

C. Usability Study

Key Persons.

Suzanne Boyd, Client Engagement Director
 Camy Naasz, User-Centered Design Consultant, Project Lead
 Kristina Rakestraw, UX Designer
 Emily Stafford, UX Researcher
 Austin Clark, UX Researcher
 Beth Somerfield, Project Manager and Digital Accessibility Expert

Tasks:	Hourly Rate	Hours	Total
Analyze existing customer data	\$185	20	\$3,700
Design remote usability study	\$185	30	\$5,550
Conduct remote usability study (16 participants, 1 hour each)	\$185	30	\$5,550
Recruitment (16 participants at estimated \$200 each)			\$3,050
Honoraria (16 participants at \$100 each)			\$1,600
Note taking – usability study	\$155	30	\$4,650
Analysis and reporting – usability study	\$185	50	\$9,250
Design ideation workshop	\$185	30	\$5,550

Conduct ideation workshop	\$185	10	\$1,850
Note taking – ideation workshop	\$155	10	\$1,550
Analysis and reporting – ideation workshop	\$185	50	\$9,250
Project management	\$135	68	\$9,180
Total for Task C			\$60,730

Deliverables:

- Usability study plan, including key user scenarios, facilitation script, UX/UI metrics to be collected, pre- and post-test interview and survey questions, scope, logistics, and participant criteria
- Usability study with 16 representative customers, conducted using remote technology to encourage participation from multiple geographies.
- Report of findings and recommendations from the usability study, including baseline UX/UI metrics, themes in what is working well / not working well about the current UX/UI
- Raw data from the usability study, including video footage, quantitative and qualitative notes.
- Ideation workshop with key stakeholders to develop low-fidelity prototype for future state of the system
- Project management deliverables: agendas, status reports, presentations, meeting minutes, collaboration site, core team meetings and other deliverables focused on educating and evangelizing the importance of UX/UI.

D. Scope Development

Key Persons.

Suzanne Boyd, Client Engagement Director

Camy Naasz, User-Centered Design Consultant, Project Lead

Kristina Rakestraw, UX Designer

Beth Somerfield, Project Manager and Digital Accessibility Expert

Tasks:	Hourly Rate	Hours	Total
Develop Project roadmap	\$185	54	\$9,990
Develop UX/UI language for RFP	\$185	20	\$3,700
Ongoing UX/UI SME consulting (up to 100 hours)	\$185	106	\$19,610
Project management	\$135	48	\$6,480
UX/UI Presentation for Project Team	\$185	12	\$2,220
Total for Task D			\$42,000

E. Allowable Costs; Reimbursables

Agency shall reimburse Contractor at actual cost for expenditures that are pre-approved by Agency in writing and are necessary and directly applicable to the work required by the Contract. Notwithstanding the preceding sentence, Agency hereby expressly approves the following expenses as reimbursable costs to the extent that such costs are directly applicable to the work required by the Contract:

- Travel costs to deliver the 4-Day UX Intensive Training onsite at OPRD, including airfare, lodging, meals, taxis, parking, rental cars, and vehicle mileage (reimbursable at the Federal IRS Standard Business Mileage Rate in effect at the time the mileage expense is incurred);
- Research participant recruitment and related costs, including but not limited to recruitment and honoraria costs via a third-party recruitment vendor within the limits set forth in table of Deliverables and costs set forth for Task C above.

PAYMENTS

Contractor shall complete and deliver to Agency each of the Deliverables associated with Tasks A, B, C, and D. Upon OPRD’s acceptance of each Deliverable set forth within this Statement of Work for Phase 1, Contractor may invoice and OPRD will pay Contractor the appropriate hourly rate times the number of hours incurred by Contractor in completing that Deliverable; provided that the cumulative costs of all Deliverables associated with a Task (i.e., Task A, B, C, or D) shall not exceed the Total Cost for that Task as set forth in the Deliverable and cost table for each Task set forth above. In addition, Agency will reimburse Contractor for allowable expenses pre-approved by OPRD. All payments shall be made and expenses reimbursed in accordance with Section 4 of the Contract.

PHASE 2

A. Kick off and Discovery

Key Roles:

- Project Lead
- User-Centered Design Consultant
- UX Designer
- UX Researcher
- Digital Accessibility Specialist
- Content Strategist

Tasks:	Hourly Rate	Hours	Total
Team set up, Project set up, align on goals, scope, requirements and processes	\$190	55	\$10,450
Interactive Project kick-off	\$190	30	\$5,700
Total for Task A			\$16,150

B. Vendor Evaluation

Key Roles:

- Project Lead
- UX Research Operations
- User-Centered Design Consultant
- UX Researcher
- Digital Accessibility Specialist

Tasks:	Hourly Rate	Hours	Total
UX consulting - RFP, vendor engagement, requirements refinements, RFP Q&A	\$190	100	\$19,000
Proposal Reviews	\$190	80	\$15,200
Demo evaluation, public-facing	\$190	90	\$17,100
Demo evaluation, staff-facing	\$190	75	\$14,250
<u>Consulting for evaluation criteria</u>	<u>\$190</u>	<u>40</u>	<u>\$7,600</u>
Sandbox evaluation <u>readiness check, public-facing Vendor 1</u>	\$190	80	\$15,200
Design, conduct, document, analyze and report sandbox usability study, public-facing <u>Vendor 1</u>	\$190	230	\$43,700
<u>Sandbox readiness check, public-facing Vendor 2</u>	<u>\$190</u>	<u>80</u>	<u>\$15,200</u>
<u>Design, conduct, document, analyze and report sandbox usability study, public-facing Vendor 2</u>	<u>\$190</u>	<u>170</u>	<u>\$32,300</u>
Sandbox evaluation <u>readiness check, staff-facing Vendor 1</u>	\$190	60	\$11,400
Design, conduct, document, analyze and report sandbox usability study, staff-facing <u>Vendor 1</u>	\$190	180	\$34,200
<u>Sandbox readiness check, staff-facing Vendor 2</u>	<u>\$190</u>	<u>60</u>	<u>\$11,400</u>
<u>Design, conduct, document, analyze and report sandbox usability study, staff-facing Vendor 2</u>	<u>\$190</u>	<u>140</u>	<u>\$26,600</u>
<u>Content Evaluation</u>	<u>\$190</u>	<u>160</u>	<u>\$30,400</u>
Vendor onboarding	\$190	20	\$3,800
Revisit roadmap based on vendor selection	\$190	40	\$7,600
Total for Task B			<u>\$181,450</u>
			<u>\$304,950</u>

Deliverables:

- UX/UI SME consulting for RFP
- Prepare responses to vendor Question and Answer period in collaboration with OPRD
- Proposal review
 - Proposal review UX/UI evaluation criteria
 - Review UX/UI elements of 2-4 vendor proposals
- Demo Evaluations
 - Evaluation plans for public-facing demos, including UX/UI and accessibility demo scripts and assessment criteria
 - Evaluation plans for staff-facing demos, including UX/UI and accessibility demo scripts and assessment criteria
 - Evaluate 2-3 public-facing demos
 - Evaluate 2-3 staff-facing demos
 - Demo evaluation report

- Consulting for evaluation criteria
 - Support OPRD team in developing criteria for staff to evaluate sandbox environments
 - Review criteria and provide recommendations based UX and accessibility expertise
- Sandbox Evaluations Readiness Checks
 - Evaluation plans for Readiness Checks of public-facing sandboxes, including assessment criteria and scoring ~~key tasks, scope, logistics~~
 - Evaluation plans for Readiness Checks of for staff-facing sandboxes, including assessment criteria and scoring ~~key tasks, scope, logistics~~
 - One Evaluation for each of the 2 public-facing sandbox systems
 - One Evaluation for each of the 2 staff-facing sandbox systems
 - Report of sandbox evaluation findings
- Sandbox studies
 - One study plan for both public-facing sandboxes, including assessment criteria, key tasks, scope, logistics
 - One study plan for both staff-facing sandboxes, including assessment criteria, key tasks, scope, logistics
 - One usability study of ~~two~~ each public-facing sandbox systems with 8-12 representative customers including customers with disabilities, conducted using remote technology to encourage participation from multiple geographies
 - One usability study of ~~two~~ each staff-facing sandbox systems with 8-10 representative customers, conducted using remote technology to encourage participation from multiple geographies
 - Report of findings and recommendations from the ~~2~~ 4 studies, including UX/UI recommendations for creation of the UX concept
 - Raw data from the usability studies, including video footage, quantitative and qualitative notes
- Content Evaluation
 - Scoring model and scoring
- Updated Project roadmap outlining scope, deliverables and UX/UI process requirements

C. UX Research

Key Roles:

- Project Lead
- UX Research Operations
- User-Centered Design Consultant
- UX Researcher
- UX Research Associate
- Digital Accessibility Specialist

Tasks:	Hourly Rate	Hours	Total
Analyze and report on web analytics user traffic patterns	\$190	20	\$3,800
Design, conduct, analyze and report customer survey	\$190	105	\$19,950

Research and create customer personas	\$190	80	\$15,200
<u>Research and create aspirational customer personas</u>	<u>\$190</u>	<u>180</u>	<u>\$34,200</u>
<u>Research and refine existing internal personas</u>	<u>\$190</u>	<u>149</u>	<u>\$28,310</u>
Design, conduct, document, analyze and report UX concept usability study, public-facing	\$190	250	\$47,500
Design, conduct, document, analyze and report UX concept usability study, staff-facing	\$190	180	\$34,200
Total for Task C			\$120,650 <u>\$183,160</u>

Deliverables:

- Report on web analytics user traffic patterns
- Report with key customer personas
- Report with aspirational customer personas
 - Workshop to identify what’s missing from the current customer personas (includes communications, parks staff)
- Report with internal personas
 - Design and facilitate a workshop to build internal capacity in creating data-driven personas (5-6 attendees)
- Survey
 - Customer survey research plan, including survey questions, metrics to be collected, and scope
 - Report of findings and recommendations from customer survey
 - Raw data from survey
- Studies
 - Usability study plans, including key user scenarios, facilitation script, UX/UI metrics to be collected, pre- and post-test interview and survey questions, scope, logistics, and participant criteria
 - i. Usability study of public-facing system concept with 10-12 representative customers, including people with disabilities
 - ii. Usability study of staff-facing system concept with 8-10 representative users
 - iii. Report of findings and recommendations from the two studies, including UX/UI recommendations for implementation in V1
 - iv. Raw data from the usability studies, including video footage, quantitative and qualitative notes

D. UX Design

Key Roles:

- User-Centered Design Consultant
- UX Designer

- Digital Accessibility Specialist

Tasks:	Hourly Rate	Hours	Total
Digital style guide workshop	\$190	20	\$3,800
Digital style guide	\$190	80	\$15,200
Digital style guide revisions and approvals	\$190	40	\$7,600
UX problem setting	\$190	50	\$9,500
UX design concept, public-facing	\$190	100	\$19,000
Accessibility annotation, public-facing	\$190	40	\$7,600
UX design concept, staff-facing	\$190	100	\$19,000
Accessibility annotation, staff-facing	\$190	40	\$7,600
Design system draft	\$190	40	\$7,600
Total for Task D			\$96,900

Deliverables:

- Digital Style Guide Workshop
- Digital Style Guide
- Design themes and principles to guide the design process and serve as grounding points for decision-making
- Annotated UX design concept, public-facing
- Annotated UX design concept, staff-facing
- Draft Design System (to be completed in phase 3)

E. Taxonomy

Key Roles:

- Content Strategist
- UX Researcher
- Digital Accessibility Specialist

Tasks:	Hourly Rate	Hours	Total
Taxonomy discovery, including: identify use cases that are, could be, or should be supported by controlled vocabulary, identify existing functional and business requirements, identify and collect existing controlled vocabularies, analyze site content for additional term candidates and analyze search logs for additional term candidates	\$190	96	\$18,240

Taxonomy drafting, including: create initial taxonomy, test taxonomy with users	\$190	144	\$27,360
Total for Task E			\$45,600

Deliverables:

- o List of key use cases, confirmed by OPRD
- o Draft taxonomy (Excel file)
- o Tree test results
- o Recommendations for improving the taxonomy based on tree testing with users

F. Information Architecture

Key Roles:

- o User-Centered Design Consultant
- o Content Strategist
- o UX Researcher
- o Digital Accessibility Specialist

Tasks:	Hourly Rate	Hours	Total
Content inventory and sample content audit	\$190	130	\$24,700
Current state analysis of public-facing IA integration with OPRD.org, web site, .gov web site, and other OPRD properties	\$190	50	\$9,500
Tree Test, public-facing	\$190	55	\$10,450
Information architecture design	\$190	100	\$19,000
<u>Content Modeling</u>	<u>\$190</u>	<u>189</u>	<u>\$35,910</u>
Total for Task F			\$63,650 <u>\$99,560</u>

Deliverables:

- o Full site inventory (excluding PDFs, assuming no more than a 1000 pages). Assumes automated inventory can be generated via Moz or equivalent tool
- o Sample content audit (up to 250 pages)
- o Summary of findings from the tree test study
- o Information architecture
- o One core model workshop with key content contributors from each system (8 people maximum)
- o Content wireframes/sketches to inform design (11 content models)

G. Content Creation

Key Roles:

- o Content Strategist

o Digital Accessibility Specialist

Tasks	Hourly Rate	Hours	Total
Advise on photography	\$190	5	\$950
Advise on park descriptions	\$190	5	\$950
Advise on site descriptions	\$190	10	\$1,900
Advise on park draft data	\$190	10	\$1,900
Advise on site draft data	\$190	5	\$950
Advise on Map/GIS draft data	\$190	5	\$950
Advise on home and info page draft content	\$190	10	\$1,900
Assist in system draft content (labels, error messages, alert, warnings, buttons, navigation labels, etc.)	\$190	20	\$3,800
Advise on park data refinement	\$190	5	\$950
Advise on site data refinement	\$190	5	\$950
Advise on map/GIS data refinement	\$190	5	\$950
Total for Task G			\$16,150

Deliverables:

- o UX/UI SME consulting on web content with a specific focus on system content and key pages

H. Training

Key Roles:

- o Project Lead
- o User-Centered Design Consultant
- o Content Strategist
- o UX Researcher
- o UX Designer
- o Digital Accessibility Specialist

Tasks	Hourly Rate	Hours	Total
Plan and conduct writing for the web training for content creators	\$190	30	\$5,700
Plan and conduct accessibility workshop for content creators	\$190	30	\$5,700
Total for Task H			\$11,400

Deliverables:

- o Writing for the web training for OPRD content creators (Virtual or in-person TBD)
- o Accessibility workshop for OPRD content creators (Virtual or in-person TBD)

I. Governance

Key Roles:

- User-Centered Design Consultant
- Content Strategist
- Organizational Change Manager

Tasks	Hourly Rate	Hours	Total
Plan and facilitate governance policies and procedures workshop	\$190	50	\$9,500
Total for Task I			\$9,500

Deliverables:

- Governance policies and procedures workshop (Virtual or in-person TBD)

J. Change Management

Key Roles:

- Project Lead
- Organizational Change Manager

Tasks	Hourly Rate	Hours	Total
Stakeholder mapping and key informant interviews	\$190	60	\$11,400
Change Management Plan	\$190	70	\$13,300
Change Management ongoing support	\$190	915	\$3,600 <u>\$173,850</u>
Total for Task J			\$108,300 <u>\$198,550</u>

Deliverables:

- Stakeholder analysis
- Summary of key informants
- Change management plan

K. Project Management and Consulting Services

Key Roles:

- Project Lead
- Client Engagement Director

Tasks	Hourly Rate	Hours	Total
Project coordination and management for all workstreams	\$190	735 <u>1064</u>	\$139,650 <u>\$202,160</u>
Total for Task K			\$139,650 <u>\$202,160</u>

Deliverables:

- o Project management deliverables: agendas, status reports, presentations, meeting minutes, collaboration site, core team meetings, leading roadmap reevaluation, and other deliverables focused on educating and evangelizing the importance of UX/UI.

L. Payments for Services Provided in Phase 2

Contractor shall complete and deliver to Agency each of the Deliverables associated with Tasks A through K in Phase 2. Upon OPRD’s acceptance of each Deliverable set forth within this Statement of Work for Phase 2, Contractor may invoice and OPRD will pay Contractor the appropriate hourly rate times the number of hours incurred by Contractor in completing that Deliverable; provided that the cost of all Deliverables associated with a Task in Phase 2 shall not exceed the Total Cost for that Task as set forth in the cost table for each Task set forth above. In addition, Agency will reimburse Contractor for allowable expenses pre-approved by OPRD. All payments shall be made and expenses reimbursed in accordance with Section 4 of the Contract.

M. Allowable Costs; Reimbursables

Agency shall reimburse Contractor at actual cost for expenditures that are pre-approved by Agency in writing and are necessary and directly applicable to the work required by the Contract. Notwithstanding the preceding sentence, Agency hereby expressly approves the following expenses as reimbursable costs to the extent that such costs are directly applicable to the work required by the Contract:

- Travel costs for 1 trip per quarter for up to 3 team members, including airfare, 1 night hotel, meals, taxis, parking, rental cars, ~~and~~ vehicle mileage (reimbursable at the Federal IRS Standard Business Mileage Rate in effect at the time the mileage expense is incurred), and travel time; trips will be planned on an as-needed basis for mutually agreeable times and are not required to be quarterly.
- Research participant recruitment and related costs, including but not limited to recruitment and honoraria costs via a third-party recruitment vendor within the limits set forth in table of Deliverables and costs set forth for Phase 2 Tasks B, C, E and F above.

Tasks	Total
Travel costs	\$13,500 <u>16,160</u>
<u>Travel time (billed at half rate)</u>	<u>\$4,750</u>
Study recruitment (24 participants)	\$7,200
Vendor evaluation honoraria (24 participants @ \$125)	\$3,000
<u>Study recruitment UX Concept (12 participants)</u>	<u>\$3,600</u>
<u>Study honoraria UX Concept (12 participants @ \$125)</u>	<u>\$1,500</u>
Tree Test and Card Sort Recruitment	\$2,000
Tree Test and Card sort Honoraria	\$1,500
Total Allowable Costs; Reimbursable for Phase 2 Tasks	\$27,200 <u>39,710</u>

PROJECT TIMELINE

The OPRD Outdoor Recreation Solution System Project has a timeline extending out through 2025, with solution launch anticipated either in spring of 2025. Contractor will be engaged at different points during the Project timeline based upon the final Statement of Work. The timelines below are currently within the projected Project timeline but are subject to change.

Timeline for Phase 1 Tasks

Phase 1 Task	Anticipated Timeline
A. UX (user experience) and UI (user interface) requirements	September 9 through November 25, 2019
B. Market Analysis	September 9 through October 18, 2019
C. Usability Study	September 9 through November 11, 2019
D. Scope Development	September 9 through November 30, 2019
E. System Evaluation Scripts	Conducted July – September 2020
F. Final Requirement Validation	Conducted Winter 2020 – Spring 2021

Timeline for Phase 2 Tasks. The timelines for Phase 2 tasks below are within the revised timeline but are subject to change.

Phase 2 Task	Anticipated Timeline
A. Discovery and Planning	October 2022 through January 2023
B. Vendor Evaluation	Amendment 3 Effective Date through September <u>October</u> 2023
C. UX Research and Evaluation	January through December 2023
D. UX Design	April through November 2023
E. Taxonomy	January through December 2023
F. Information Architecture	January through December 2023
G. Content Creation	February through December 2023
H. Training	January through October 2023
I. Governance	February through December 2023
J. Change Management	October 2022 through December 2023
K. Project Management and Consulting Services	Amendment 3 Effective Date through December 2023

During the completion of the Phase 2 Services Contractor and Agency will jointly create and maintain a project plan (the “Project Plan”) that sets forth the specific dates, within the timelines set forth above, that Contractor will complete certain tasks and deliver certain Deliverables. The Contract Administrators identified in the Contract for both Contractor and Agency shall agree to the initial Project Plan in writing, and to each subsequent amendment to the Project Plan. The most recent version of the Project Plan that has been agreed to in writing by the Authorized Representatives of both parties shall establish the delivery schedule for the Tasks and Deliverables for Phase 2. Contractor shall provide the Services, Tasks and Deliverables in accordance with such approved Project Plan.

2. OTHER OPRD PROJECTS AND INITIATIVES

From time to time during the Contract term, OPRD may identify other projects and initiatives that would benefit from Contractor's UX and UI expertise. Contractor shall provide consulting services related to such additional projects and initiatives subject to the successful negotiation and execution of a mutually-agreeable Contract amendment that describes the work, deliverables, timelines, and cost.