**ATTACHMENT 1 – SCOPE OF WORK & DELIVERABLES**

**SECTION 1 – SCOPE OF WORK**

The goal of this research project is to 1) examine the existing QPL program to establish and document software issues, core functions, workflows, and deliverables, 2) provide an analysis of process improvements and enhanced features beneficial to ITD, and 3) Investigate the options available for QPL program replacement software and make recommendations for the most suitable option based on serviceability, function, cost, and timeframe.

The following tasks are required for this project:

1. **Task 1**

Host and conduct a project kick-off meeting, via video or teleconference, with ITD’s Project Manager (PM) to discuss:

1. Project tasks and deliverables
2. Project schedules and timelines
3. Data and information needs
4. Staff responsibilities and assignments (as applicable)
5. Proposed schedule for project meetings
6. **Task 2**

Analyze core program functions, examine workflows, and deliverables for ITD’s current QPL system and process. Identify issues of the existing QPL program.

1. **Task 3**

Survey other states to learn what systems and processes are used for their QPL programs and compare to ITD program.

1. **Task 4**

Research available technology to automate many of the manual functions of the existing program, thereby reducing administration resource requirements. Anticipated improvements include, but are not limited to:

1. Product Manufacturer web portal
   1. Manufacturer will maintain their company profile, and will be responsible to keep it updated
      1. Name
      2. Address
      3. Company Telephone number
      4. Website address
      5. Contact person
      6. Telephone number
      7. Email address
   2. Manufacturer will enter new product information
      1. Complete application/product information
      2. Categorize product
      3. Obtain product evaluation status
      4. Receive product information requests
   3. Manufacturer will update product information
      1. Product name changes
      2. Update design or composition changes
      3. Annual recertification – product continues to be produced as evaluated (replacing current 5-year recertification)
      4. Discontinued products
2. Automated generation of letters and notices
   1. Automatic product evaluation requests to the evaluators once new products are entered and categorized (includes a link to product status page) – similar to current program
   2. Automatic notification to the administrator when an evaluation is submitted (includes a link to product status page) – similar to current program
   3. Automatic evaluation reminders to evaluators and administrator – currently two-week reminders set up in outlook
   4. Automatic notification to manufacturer when additional information is requested – currently done manually
   5. Automatic letter (from template) to manufacturer when evaluation is complete – currently done manually
3. Link QPL information to Standard Specifications
   1. Automatically update QPL category information when Standard Specifications are updated
   2. Send notification to Subject Matter Experts (SME) of changes – need to check impact to previously approved products
4. Provide capability for alternate evaluators
   1. Reduce the burden on individual Subject Matter Experts (SME)
   2. Reduce evaluation time (alternate evaluators can step in when needed)

The credibility of any information-based QPL program is dependent on the quality of the information. Accurate, up-to-date information is critical. The improvements listed above will provide the greatest opportunity for success by providing the most current information available.

The following program features will also result from the deliverables of this project:

1. Serviceable
   1. Maintenance
   2. Updates to Department themes and guidelines to keep current
   3. Expansion – allow modification as the Department’s needs change
2. Secure
   1. Ability to upgrade security features to meet new threats as needed
3. Expanded functionality
   1. Manufacturers
   2. Program management
   3. Evaluators
   4. End users
4. **Task 5**

Examine QPL software options available to include, but not limited to:

1. Overhaul existing program/software
2. Purchase off-the-shelf software
3. Develop new software in house
4. State-pooled fund for AASHTO QPL software development (work with existing or start up)
5. Joint software development with University or Contractor
6. Integrate software used by other DOTs
7. Search for other suitable software options

*\*Note – all purchase options need to include research and consulting with ITD’s purchasing unit. Idaho state agencies are required to adhere to procurement rules set forth by the state’s Division of Purchasing (*[*https://purchasing.idaho.gov/*](https://purchasing.idaho.gov/)*).*

1. **Task 6**

Evaluate each software option as to:

1. Serviceability by ETS
2. Obsolescence – Duration of service to the Department
3. Workflows
   1. Similar to current program (familiarity)
4. Features
   1. Ability for manufacturers/ITD/contractors and other end users to provide/access pertinent information
5. Filters
   1. Limit external access to protect proprietary information
6. Ease of use
   1. Searchable/Intuitive commands
   2. By Manufactures, Evaluators and end users
7. Security features
8. Expandability
   1. Ability to add features and modify or enhance program with minimal effort
9. Equipment resource requirements
   1. Computer architecture
   2. Storage requirements
10. Personnel requirements
    1. Program management time expenditure by program administrator (automation)
    2. Service requirements (maintenance)
    3. Evaluator time expenditure
       1. Quick access to product information
       2. Ease of use to provide determination
       3. Ability to store product notes - some for internal use only, some for all to see
       4. Ability to place restrictions of use for all to see
    4. End user time expenditure
       1. Quick access to useful product information
11. Integration of existing QPL information – 2,800+ products to transfer to new program
12. Cost
13. Timeframe to develop/implement
14. **Task 7**

Final Report

1. Document capabilities and limitations of existing program
2. Document advantages/disadvantages of each option
3. Document evaluation process
4. Recommend best solution
5. Define critical path for software development and implementation project (Phase II)
   1. Establish Phase II milestones
      1. Develop program
      2. Integrate existing products
      3. Implement/troubleshoot
      4. Create user manual/train
      5. Completion deadline
6. Provide cost estimate for Phase II
7. Recommend Technical Group resources (ETS/Program Administrator/End Users) to provide oversight to Project Phase II

**SECTION 2 - DELIVERABLES**

Project deliverables must include the following:

1. **Deliverable 1**

The contractor must initiate a project kick-off meeting, via video or teleconference, with ITD’s PM within ten (10) business days after contract award date and provide meeting minutes within seven (7) days following the kick-off meeting.

1. **Deliverable 2**

The contractor must provide working papers and technical documents documenting the research performed, methods used, and the resulting findings for each task outlined above.

1. **Deliverable 3**

The contractor must host and conduct monthly project status meetings with ITD’s PM via video or teleconference. These meetings are designed to cover the progress of all working papers or technical documents being written. Meeting minutes must be taken and supplied to the ITD PM within seven (7) days after the meeting.

1. **Deliverable 4**

The contractor must provide ITD’s PM with monthly project summary reports, using the ITD Form 0771: <https://apps.itd.idaho.gov/Apps/FormFinder2DMZ/>

1. **Deliverable 5**

The contractor must meet with ITD PM, during Task 6 but before drafting and presenting the final report, to discuss project findings, conclusions, and recommendations. Meeting minutes must be taken and supplied to the ITD PM within seven (7) calendar days after the meeting.

1. **Deliverable 6**

The contractor must provide a final report of work efforts, findings, and conclusions using ITD’s Research Report Template. Report shall be consistent with ITD’s Research Program Report Process and Style Guide available in the Resources for Research section found at: <https://itd.idaho.gov//alt-programs/?target=research-program&target=research-program>. The Contractor must host and conduct a presentation, via video or teleconference, with ITD’s Project Manager (PM) to discuss the final findings and recommendations.

1. Draft final report – A written report is required for each ITD supported research project. Prior to submitting a draft report to ITD, the draft report shall be reviewed by a qualified peer reviewer approved by ITD and be edited to ensure the report is clear, concise, and conforms with requirements in the ITD Research Program’s Style Manual for Research Reports . The draft report must be prepared using ITD’s Research Report template. The style guide and template are available in the “Resources for Researchers” section of the Research program website.
2. Final report – The final report should be professionally done and comparable in quality to a published journal article or dissertation. The report must be written to be understandable to both the technical staff involved in the project (engineers, planners, etc.) and other likely readers (department management, board members, legislators, etc.).