Contents

1. Organizational Change Management (OCM) Requirements

This section describes the vendor OCM requirements.

1.1 OCM Deliverables

The Offeror shall deliver the following artifacts for each production release which shall be reviewed and approved by the state.

- **Change Management Strategy**: The vendor should provide a clear and comprehensive strategy that outlines how the State's change management plans will be supported.

- **Training Plan**: See Training Deliverables

- **Project Management Support**: The vendor should provide project management support to make sure that the change management effort is included in the schedule.

1.2 OCM Requirements

The vendor shall provide assistance to, and collaborate with, the State in supporting the overall OCM effort by including OCM in all aspects of the project and in the creation and review of the communication plan, content development, overall training plan with regards to the new system, and responding to survey feedback.

The Offeror will:

- **OCM Meeting Participation** – The vendor's OCM lead shall be an active member of the State's OCM team to provide assistance and act as a system/vendor liaison to the OCM team on OCM matters.

- **OCM-Related Plan Review** – For each phase of the project, the vendor shall review and collaborate on any recommendations to the State on the OCM Plans as it pertains to the new system, including:
  - OCM Plan
  - Communication Plan
  - OCM Project Schedule
- **Content Development** – The vendor shall assist with the development of content related to communications, training, and other OCM activities per request by the State.

- **Change Assessment** – The vendor shall assist with the change readiness assessment by reviewing and offering recommendations on items related to the new system.

- **Change Analysis** – The vendor shall support assessing the differences between current state and end state vision, including the degree to which change is necessary to reach the vision, and how the State will operate within the system.

1.3 Effected Population

The following defines the rough population that will require be affected by change.

Category	System Scope	Count
DOR Staff	All Vehicle and Payment Collection Functions	100

Motor Vehicle Information	Queries	1,000
County Staff	Vehicle and Fiscal Services and Payment Collections	275
Third Party	Access and Limited Transactions	Unknown
Dealers	Vehicle Services	4,500

2.   Training Requirements

This section describes the Offeror training requirements.

2.1   Training Deliverables

The Offeror shall deliver the following artifacts for each production release which shall be reviewed and approved by the state.

- **Training Plan** that describes each required type of training
- **Training Materials** for each type of training including quick reference guides and course curriculums; training materials must be electronic, searchable, and indexed for ease of use. These materials must be reproducible and editable by DOR at no additional cost, this includes, but is not limited to CBTs, electronic, and hard-copy documentation.
- **Computer Based Training Modules** for each type of training that demonstrate various activities that users would perform in the system
- **Training/Practice Environment** and non-production data with refreshes and support for concurrent sessions
  - Including a key/crosswalk that allows the ability to connect training customers to production customers.
  - Data will be masked or scrambled
- **Training Schedule** for training delivery so users are educated in a 'just in time' approach prior to go live
- **Delivering Training** as defined in the approved training plan
- **Training Attendance Records** reports to show who attended each class
- **Knowledge Transfer Plan** and activities that outlines the approach for Transition out activities and final training for users and technical staff

2.2   Training Requirements

2.2.1 Required Training Activities

At a minimum, the Offeror shall:
- **Develop and Update Training Materials** – Develop and maintain all training courses/curriculum, evaluations and supporting materials. Update and effectively communicate such updates to training materials and training courses, especially as defects and workarounds are identified, and incremental functionality is deployed.

- **Manage & Protect Training Data** – Develop tools and mechanisms for populating and refreshing data so the information is usable for training. Where applicable data should be masked or scrambled (e.g., PII)

- **Manage Training Environments and Data** – Establish and maintain Training and Sandbox/Practice environments with data to support training activities. These environments must be accessible in all branch/county office locations.

- **Deliver Training** – Prepare and deliver the types of training listed.

- **Evaluate Effectiveness** – Develop metrics and mechanisms for evaluating the effectiveness of the training classes and overall training process. Implement changes as a result of information gathered.

- **Assess Readiness** – Develop and implement a process to ensure the state technical staff, including the Helpdesk and Support Groups, are prepared to support the technical operation of the solution.

2.2.2 Training Plan Requirements

The Offeror shall develop and document a Training Plan that defines and recommends a training program to ensure that all users and support staff are prepared to operate and support the system. This would include approaches for field locations that cannot be closed for extended periods of time.

The Offeror shall provide assistance to, and collaborate with, the State in determining the number of classes, web-based training modules, and sessions necessary to successfully train staff.

The Training Plan shall include at a minimum:

- **Course & Curriculum Descriptions** – Describes the list of courses and overall flow of the training, including the training materials to be used in each course and recommended hours for each course.

- **CBT and Live Training** – Inclusion of both Computer Based Training and Instructor-Led training for all users. Computer Based Training is not required for IT support staff.

- **Delivery Approach** – Delivery approach for each user type/role including Instructor-Led, Computer Based Training, webinar, etc.

- **Trainer Training** – Train-the-Trainer approach to prepare State training staff

- **Third Party Partner Training** – A training plan for supporting Third-party vendors for entering test scores, flags, and performing a set of transactions.

2.2.3 Training Material Requirements

The State will own and reserves the right to reproduce all training materials and content for training the varied users, and to make changes to those training materials.

Training material requirements include all of the following:

- Training materials shall include at a minimum: quick-start guides, user guides, how-to documentation, and FAQs, as appropriate.

- Training materials shall be delivered to the State to be placed on a shared location accessible the project team and State employees.
- Training materials and courses shall describe modifications, configurations, and procedures made for the State, and shall employ the State's terminology.
- Web-based courses shall be developed on standard/easily obtainable tools to allow future handoff of material for the State to update (i.e., no custom training development toolset allowed).
- Training materials and tools shall include the capability, including licenses for any specialized tools, for the State to update any training materials.

2.2.4 Required Training

The Offeror shall conduct the following training:

- **User Training** – Training for State, County, Authorized Agents, Call Center, and Helpdesk Staff in advance of any production implementation to teach users how to use the completed system, including business-based scenarios.
- **Trainer Training** – Train-the-Trainer training to enable State staff to deliver training in the future
- **Test Team Training** – Tester training on all modules of the system prior to the start of each testing phase
- **Test Team Tool Training** – Tester training for the State testing teams to enable them to learn the system, testing tools, processes
- **IT Staff Training** – Technical Staff Knowledge Transfer to understand solution architecture, database layouts, configuration and parameter settings, interfaces, and reporting functions. This includes ongoing sessions as well as materials to assist in transitioning.
- **Project Closeout Training** – Final round of training during Transition Out activities for any recent technical or application updates

2.2.5 Knowledge Transfer Requirements

The Offeror shall develop a Knowledge Transfer Plan that will include all activities to ensure the State staff have the knowledge and skills needed to support the system.

The Offeror shall prepare a plan that describes how knowledge will be transferred throughout the project to the State technical and support staff. The Knowledge Transfer Plan shall support active participation and involvement of the State's resources from project initiation through to system turnover

Knowledge transfer to the state shall specifically include:

- Working knowledge of the solution environment
- Working knowledge of all technical configurations associated with the System, its architecture, data file structure, interfaces, any batch programs, and any hardware or software tools utilized in the performance of this Contract
- Training on the use of system management, configuration, and development tools necessary to support and enhance the system

2.3 Training Population

The following defines the population that will require training.

Category	System Scope	Count
DOR Staff	All Vehicle and Payment Collection Functions	100
Motor Vehicle Information	Queries	1,000
County Staff	Vehicle and Fiscal Services and Payment Collections	275
Third Party	Access and Limited Transactions	Unknown
Dealers	Vehicle Services	4,500