

Roles and Responsibility Matrix (RACI)

Project Activities	Contractor		County
	Onshore	Offshore	
Project Initiation			
Provide Resumes of Contractor Key Personnel	R		
Approve/Reject Contractor Key Personnel			R
Name Project Team Members	R		
Develop Salesforce PaaS Orientation and Induction Program for County APAS staff	R		I
Develop Getting Started Salesforce Workbook	R		I
Develop Getting Started Salesforce Implementation Guide	R		I
Present/Attend Contractor ValuePath Methodology orientation to County staff	R		R
Produce Project Kickoff Deck	R		I
Present/Attend Project Kick-off Presentation	R		R
Produce APAS Project Organization and Staffing Plan	R		R
Review and Approve APAS Project Organization and Staffing Plan			R
Update the Disaster Recovery/Business Continuity Plan for Project	R		
Review and Approve Contractor DR/BC Plan for Project			A
Produce Communication Plan and Templates	R		C
Review & Accept Communication Plan and Templates			R
Produce Weekly Status Reports - Templates	R		I
Review & Accept Weekly Status Reports - Templates			R
Produce Monthly Status Reports - Templates	R		I
Review & Accept Monthly Status Reports - Templates			R
Produce Master Availability Plan	R		R
Document Material/Equipment Requirements	R		
Develop Project Team Organization Plan	R		
Develop High Level Scope	R		C
Develop Initial Project Schedule	R		A
Develop Logistic & Escalation Plan	R		
Develop Risk Management Plan	R		
Develop Approval Process	R		C
Develop Project Management Plan (including Standard and Methodology)	R		A
Review & Accept Project Management Plan (including Standard and Methodology)			R
Develop Project plan/schedule for the Definition Phase	R		C
Review & Accept Project plan/schedule for the Definition Phase			R
Ongoing Project			
Set-up and Maintain Project Management Tool	R	A	

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Project Activities	Contractor		County
	Onshore	Offshore	
Develop necessary project reports and Establish target values for all metrics (refine metrics as needed)	R		R
Implement real-time metrics and delivery dashboards	R		A
Implement process improvements to achieve metric targets	R		R
Deliver Weekly Status Reports	R		I
Deliver Monthly Status Reports	R		I
Document Change Control Requests			R
Perform Change Request Impact Assessments	R		A
Participate in Executive Steering Committee	R		R
Participate in Change Control Board Meetings	R		R
Participate in Architectural Review Board Meetings	R		R
Participate in Advisor's (Gartner, Salesforce, etc.) assessment meetings/interviews	R		R
Attend Daily Standups	R	A	A
Activate Phase			
For Phase 1			
Develop business context map	R		C
Develop vision document	R		C
Conduct/Attend Service/Journey Workshops	R		R
Deliver Business Process & Journey Documentation	R		A
Develop Low Fidelity Wireframes	R		A
Develop Level 0 Business Process Flows	R		A
Develop Correspondence Templates	R		A
Develop Forms and Surveys	R		A
Develop Reporting Requirements Document	R		A
Develop EPIC Level Stories with High Level Business Requirements	R		A
Understand and document the existing Legacy Systems (capabilities/limitations, data, workflows)	R		A
Develop and Deliver Detailed Business Requirements Document	R		A
Review and Approve Detailed Business Requirements Document			R
For Phase 2			
Develop business context map	R		C
Develop vision document	R		C
Conduct/Attend Service/Journey Workshops	R		R
Deliver Business Process & Journey Documentation	R		A
Develop Low Fidelity Wireframes	R		A
Develop Level 0 Business Process Flows	R		A

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Project Activities	Contractor		County
	Onshore	Offshore	
Develop Correspondence Templates	R		A
Develop Forms and Surveys	R		A
Develop Reporting Requirements Document	R		A
Develop EPIC Level Stories with High Level Business Requirements	R		A
Understand and document the existing Legacy Systems (capabilities/limitations, data, workflows)	R		A
Develop and Deliver Detailed Business Requirements Document	R		A
Review and Approve Detailed Business Requirements Document			R
For Phase 3			
Develop business context map	R		C
Develop vision document	R		C
Conduct/Attend Service/Journey Workshops	R		R
Deliver Business Process & Journey Documentation	R		A
Develop Low Fidelity Wireframes	R		A
Develop Level 0 Business Process Flows	R		A
Develop Correspondence Templates	R		A
Develop Forms and Surveys	R		A
Develop Reporting Requirements Document	R		A
Develop EPIC Level Stories with High Level Business Requirements	R		A
Understand and document the existing Legacy Systems (capabilities/limitations, data, workflows)	R		A
Develop and Deliver Detailed Business Requirements Document	R		A
Review and Approve Detailed Business Requirements Document			R
Produce Requirements Traceability Plan	R		C
Review and Approve Requirements Traceability Plan			R
Produce Gap Analysis	R		A
Review and Approve Gap Analysis			R
Innovate Phase			
Develop Usability Plan (UI Standards)	R		C
Review and Approve Usability Plan (UI Standards)			R
Develop Conceptual Architecture Diagram	R		C
Develop Standards and Best Practices (UML, TOGAF, Coding, Design, Architecture etc.)	R		C
Develop Application and Data Architecture	R		C
Develop Technology Architecture	R		C
Develop Interface Specifications and Design Document (Interface Requirement Document)	R		A
Develop Entity Relationship Diagram	R		A

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Project Activities	Contractor		County
	Onshore	Offshore	
Develop Deployment Model	R		C
Develop Security Model	R		C
Define Third Party AppExchange Apps and Opensource apps/products	R		A
Develop Wireframes and Define Design Components	R		A
Deliver Solution Design Document - Architecture	R		C
Review and Approve Solution Design Document - Architecture			R
Develop Conceptual Interface Architecture Diagram	R		I
Develop System Landscape Model	R		I
Develop Technical Specification	R		I
Document Non-Functional Requirements	R		A
Deliver Technical Requirements Document	R		A
Review and Approve Technical Requirements Document			R
Develop Environment and Migration Plan	R		I
Develop the Configuration Management Plan	R		I
Deliver Environment Management Plan	R		A
Review and Approve Environment Management Plan			R
Develop UAT Template	R		A
Deliver Master Testing Strategy that addresses all testing identified in SOW Section 3.1.4	R		A
Review and Approve Master Testing Strategy			R
Develop Change Mgmt. Program Success Metric Framework	R		C
Develop Change Management Executive and Management Interviews (OCM)	R		C
Develop SuccessPath Change Management Methodology	R		C
Deliver Organizational Change Mgmt. Plan (OCM)	R		A
Review and Approve Organizational Change Mgmt. Plan (OCM)			R
For Phase 1			
Develop Detailed Functional Requirements for Business Requirement (including Business Rules)	R		A
Develop Level 1 - 3 Business Process Flows	R		A
Develop High Fidelity Wireframes	R		A
Develop Logical Data Model and Dictionary	R		A
Map old data to Logical Data Model for	R		A
Develop Data Conversion and Design Document (including Data Transformation and Load Strategy)	R		A
Develop Security Requirements Document	R		C
Deliver Software Requirement Specification (SRS)	R		A
Review and Approve Software Requirement Specification (SRS)			R

Roles and Responsibility Matrix (RACI)

Project Activities	Contractor		County
	Onshore	Offshore	
Deliver High Level Design Document (HLD)	R		
Review and Approve High Level Design Document (HLD)			A
For Phase 2			
Develop Detailed Functional Requirements for Business Requirement (including Business Rules)	R		A
Develop Level 1 - 3 Business Process Flows	R		A
Develop High Fidelity Wireframes	R		A
Develop Logical Data Model and Dictionary	R		A
Map old data to Logical Data Model for	R		A
Develop Data Conversion and Design Document (including Data Transformation and Load Strategy)	R		A
Develop Security Requirements Document	R		C
Deliver Software Requirement Specification (SRS)	R		A
Review and Approve Software Requirement Specification (SRS)			R
Deliver High Level Design Document (HLD)	R		
Review and Approve High Level Design Document (HLD)			A
For Phase 3			
Develop Detailed Functional Requirements for Business Requirement (including Business Rules)	R		A
Develop Level 1 - 3 Business Process Flows	R		A
Develop High Fidelity Wireframes	R		A
Develop Logical Data Model and Dictionary	R		A
Map old data to Logical Data Model for	R		A
Develop Data Conversion and Design Document (including Data Transformation and Load Strategy)	R		A
Develop Security Requirements Document	R		C
Deliver Software Requirement Specification (SRS)	R		A
Review and Approve Software Requirement Specification (SRS)			R
Deliver High Level Design Document (HLD)	R		
Review and Approve High Level Design Document (HLD)			A
Develop System Design and Development Strategy	R		I
Develop System Implementation Strategy	R		I
Develop Maintenance and Operations Plan	R		I
Deliver Project Plan/Schedule for Phase 1, 2 & 3	R		
Review and Approve Project Plan/Schedule for Phase 1, 2, 3			A
Deliver Release Plan	R		
Review and Approve Release Plan			A
Define Proof of Concept	R		C

Roles and Responsibility Matrix (RACI)

Project Activities	Contractor		County
	Onshore	Offshore	
Develop User Story for Proof of Concept	R		A
Develop Proof of Concept	R		I
Create Functional Test Cases for Proof of Concept	R		A
Perform Functional Test for Proof of Concept	R		I
Create User Acceptance Test Cases for Proof of Concept	C		R
Perform User Acceptance Test for Proof of Concept	I		R
Review and Approve Proof of Concept			R
Reevaluate/adjust project cost, if needed	R		I
Review project cost reevaluation, go/no go decision			R
License AppExchange Tools			R
County Acceptance of Definition Phase			R
Build			
Setup and maintain Salesforce environments for development and testing, including application of Releases	R		
Setup and maintain AWS environments and software for development and testing	R		
Setup and maintain Backups of Salesforce and others as necessary (such as AWS, template repository)	R		
Develop Deployment Plan	R		I
Develop Test Plan	R		C
Develop Cutover Plan	R		C
Develop End-User Rollout Plan	R		C
Deliver System Development Plan	R		C
Review and Approve System Development Plan			R
Deliver Warranty Support Plan	R		I
Review and Approve Warranty Support Plan			R
Build - Phase X Start [Each Phase Build will start at this point in matrix]			
Setup and maintain AppExchange apps and Open Source tools/apps for development and testing	R		
Develop Release Scope Definition for Phase	R		A
Deliver Revised Release Plan Schedule for Phase	R		I
Review and Approve Revised Release Plan Schedule for Phase			R
Extract, transform, load Legacy Data for Phase from data files into staging, repeat as necessary	R		A
Load legacy data for phase from staging into APAS data tables	R		
Develop Reconciliation Reports for data load	A		R
Test/validate Converted Legacy Data for Phase	R		A
Validate and Approve Tested Converted Legacy Data for Phase	R		R
Deliver Data Transformation & Load, Synchronization and Reporting for Phase	R		A

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Project Activities	Contractor		County
	Onshore	Offshore	
Review and Approve Data Transformation & Load, Synchronization and Reporting for Phase			R
Deliver Education and Curriculum Strategy/Training Plan for Phase	R		I
Review and Approve Education and Curriculum Strategy/Training Plan for Phase			R
Build - Release X.x Execution [Each release will start at this point in matrix]			
For Each Sprint in Release			
Define Sprints	R		
Develop User Stories for Sprint	R		A
Review and Approve User Stories in Sprint			R
Develop and Deliver Release Acceptance Criteria for Release	R		A
Review and Approve Release Acceptance Criteria for Release			R
Configure Salesforce platform for Sprint	I	R	
Develop Code in Salesforce platform for Sprint	I	R	
Develop Interfaces to/from Salesforce platform for Sprint	I	R	
Ensure quality of the Contractor code/configuration	R	R	
Configure/Implement App Exchange or Opensource products in Salesforce platform for Sprint	I	R	
Create Unit Test Cases for Sprint	I	R	
Perform Unit Test for Sprint		R	
Create System Test Cases for Sprint	A	R	
Perform System Test for Sprint		R	
Fix tickets for Sprint	R		
Groom the Project Backlog	R		C
Define/Evaluate/Review Sprints	R		C
Conducts Sprint Retrospective	R		C
Create Functional Feature Test Cases for Release	A	R	A
Perform Functional Feature Test for Release		R	A
Create Functional Scenario Test Cases for Release	A	R	A
Perform Functional Scenario Test for Release		R	A
Create Day in the Life Test Cases for Release	A	R	A
Perform Day in the Life Test for Release		R	A
Create End-to-End Scenario Test Cases for Release	A	R	A
Perform End-to-End Scenario Test for Release		R	A
Create Security Test Cases for Release	I	R	
Perform Security Test for Release		R	C
Create Operational Test Cases for Release	A	R	A

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Project Activities	Contractor		County
	Onshore	Offshore	
Perform Operational Test for Release		R	A
Create Performance Test Cases for Release	A	R	A
Perform Performance Test for Release		R	A
Create Release Integration Test Cases for Release, as needed	A	R	
Perform Release Integration Test Cases for Release, as needed		R	
Create Data Certification Test Cases for Release	A	R	
Perform Data Certification Test for Release		R	
Create Regression Test Cases for Release	A	R	C
Perform Regression Test for Release		R	
Fix tickets for Release	R		
Create User Acceptance Test Cases for Release	I		R
Perform User Acceptance Test for Release			R
Create Release Notes for Release		R	
Review and Approve Release Notes for Release			R
Create Deployment Plan for Release	R		I
Review and Approve Deployment Plan for Release			R
Deliver documented test cases and results for Release	R		
Review and Approve documented test cases and results for Release			R
Update Documentation from Definition phase as necessary	R		
Review and Approve updated documentation from Definition Phase			R
County Acceptance of Release			R
Repeat Build - Release Execution cycle as needed			
Final Phase X Release Complete			
Create Integration Test Cases for Phase	I	R	I
Perform Integration Test for Phase	I	R	A
Create Functional Test Cases for Phase	I	R	I
Perform Functional Test for Phase	I	R	A
Create Functional Scenario Test Cases for Phase	A	R	A
Perform Functional Scenario Test for Phase		R	A
Create Day in the Life Test Cases for Phase	A	R	A
Perform Day in the Life Test for Phase		R	A
Create System Test Cases for Phase	I	R	
Perform System Test for Phase	I	R	
Create Operational Test Cases for Phase	A	R	A

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Project Activities	Contractor		County
	Onshore	Offshore	
Perform Operational Test for Phase		R	A
Create Security Test Cases for Phase	I	R	
Perform Security Test for Phase		R	C
Create Performance Test Cases for Phase	I	R	
Perform Performance Test for Phase		R	
Create Endurance Test Cases for Phase	I	R	
Perform Endurance Test for Phase		R	
Create Penetration Test Cases for Phase	I	R	
Perform Penetration Test for Phase		R	
Create Availability and Failover Test Cases for Phase	I	R	
Perform Availability and Failover Test for Phase		R	
Create Cutover Test Cases for Phase	I	R	
Perform Cutover Test for Phase		R	
Create User Acceptance Test Cases for Phase	I		R
Perform User Acceptance Test for Phase			R
Fix tickets for Phase	R		
Document and Deliver Phase Test Cases and Results		R	
Review and Approve Phase Test Cases and Results			R
Update Documentation from Definition phase as necessary	R		
Review and Approve updated documentation from Definition Phase			R
Convert Legacy Data for Phase <i>final data loads</i>	R		A
Test Converted Legacy Data for Phase <i>final data loads</i>	R		A
Validate and Approve Tested Converted Legacy Data for Phase <i>final data loads</i>			R
County Acceptance of Phase UAT			R
Go Live - Phase 1			
Conduct ethical security hack			R
Develop and document back-up of County data/metadata production for Salesforce and AWS for Phase		R	I
Implement back-up of County production data/metadata for Salesforce and AWS for Phase		R	
Review and Approve back-up of County production data/metadata for Salesforce and AWS for Phase			R
Update County COOP Annex for BCP for APAS Phase			R
Create Simulated Roll Close Test Cases for Phase	I	R	
Perform Simulated Roll Close Test for Phase		R	
Develop train-the-trainer curriculum for Phase		R	C
Develop training manuals, guides and materials for Phase		R	C

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Project Activities	Contractor		County
	Onshore	Offshore	
Develop knowledge transfer plan		R	C
Deliver End-User and Admin Training Curriculum for Phase		R	
Review and Approve End-User and Admin Training Curriculum for Phase			R
Conduct/Attend Admin Training	R		R
Develop profiles for users		R	A
Create/activate permissions for all users		R	A
Conduct/attend train-the-trainer sessions for Phase	R		R
Conduct end-user training for Phase			R
Deliver documented evidence of successful end-user training for Phase	R		
Review and approve documented evidence of successful end-user training for Phase			R
Develop Run Book/Operations Manual		R	
Review and Approve Run Book/Operations Manual			R
Develop and Deliver System Maintenance, Support and Transition Plan		R	
Review and Approve System Maintenance, Support and Transition Plan			R
Develop Release (Deployment) Readiness Evaluations and Reports		R	
Develop System Defect Resolution Reports		R	
Complete and Finalize all Phase artifacts		R	
Complete and finalize all tickets for phase	R		
Deliver System Source Code and Documentation		R	
Deliver Documented Implementation Phase Closeout	R		
Review and Approve Documented Implementation Phase Closeout			R
Define Go/No-Go criteria and checkpoints	R		R
Develop and Document Internal and external Communication Plan	C		R
Develop and Document Go-Live contingency (roll-back and recovery) plan	R		
Review and Approve Go-Live contingency (roll-back and recovery) plan			R
Review Go Live Criteria	R		R
County Go Live Decision			R
Create Dry run Test Cases for Phase	I	R	
Perform Dry Run Test for Phase		R	
Create contact list for cutover	R		
Create communication plan and critical resources for cutover	R		
Deploy Phase to Production/Execute Implementation	R	R	A
Perform contingency plan, if necessary	R	R	A
Create Exploratory/break Test Cases for Phase	I	R	

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Project Activities	Contractor		County
	Onshore	Offshore	
Perform Exploratory/break Test for Phase		R	
Create Smoke/Sanity Test Cases for Phase	I	R	R
Perform Smoke/Sanity Test for Phase		R	R
Shut down access to legacy system for phase			R
Sign off on Phase Implementation			R
Phase X Warranty			
Develop and Document System Incident Reports		R	C
Review and Approve System Incident Reports			R
Develop and Document Adaptive Maintenance Reports		R	C
Review and Approve Adaptive Maintenance Reports			R
Develop and Document System Enhancement Reports		R	C
Review and Approve System Enhancement Reports			R
Maintain Salesforce production environment include testing/applying Releases			
Monitor back-ups and correct any problems			
Handle all production support tickets			
Close out all Tickets on Phase prior to Warranty close		R	
Completion of Phase Warranty Period			R
Repeat Build & Warranty Phase cycle for Phases 2 & 3			
Document and Deliver Project Close-out	R		
Review and Approve Project Close-out			R
Document and Deliver Health Check	R		
Review and Approve Health Check			R