

SBCERA-LINEA SOLUTIONS, INC. STATEMENT OF WORK: TRAINING SERVICES

PURPOSE

This Statement of Work (SOW) outlines Linea Solutions, Inc.'s ("Linea's") proposal for Training Services in support of the BPI and PG Refresh Project. The purpose of this SOW is to provide a training specialist to assist SBCERA with analyzing staff training needs, planning training, and developing and delivering training content as per the tasks listed below.

A comprehensive training program that encompasses full end-to-end process training as well as training on the PG system functions will allow SBCERA to reap the benefits of the project changes more quickly and completely.

- **Efficient work and reduced errors.** A deeper understanding of the process changes minimizes mistakes and ensures efficiency in completed work.
- **Invested and empowered employees.** Group process training sessions encourage participation. When formal training is provided, employees are more invested and empowered in the process changes.
- **Greater sense of value.** Training gives the participants a greater sense of value in the company, which boosts employee morale. The trained employee becomes a respected source of information on the system and process changes and is able to help others when needed.
- **Increased productivity.** Training sessions elicit conversations that serve as forums for troubleshooting. During these sessions, employees are provided with the opportunity to share ideas on how to apply the process changes efficiently and solve common problems.
- **Added value to the organization as a whole.** Consistent business process training with measurable outcomes not only benefit each individual employee but are valuable to the entire organization moving forward.

BACKGROUND

SBCERA contracted with Linea to provide consulting services in support of Phases 1 and 2 of the BPI and PG Refresh project. Phase 1 is complete, and Phase 2 has been ongoing since 1/4/21. While the vendor, Levi, Ray and Shoup ("LRS") provides training for testing of changed system functions, SBCERA users require end-to-end process training in order to achieve the full benefits of the BPI and system changes.

PROPOSED WORK AND DELIVERABLES

PROPOSED SCOPE OF WORK THROUGH 6/30/2023

The following describes the work to be done under this SOW:



Conduct Training Needs Assessment:

- Conduct interviews and analysis
- Develop description of training needs
- Identify gaps in knowledge and/or resources
- Determine what will be needed to support training going forward
- Document key findings and recommendations
- Update existing Training Strategy as needed

Develop Training Objectives:

- Identify training groups
- Define training goals for each group
- Develop KPI's and determine measurement methods

Develop Training Plans focused on process changes and change impact:

For PGRefresh Deliverables 2 and 3:

- Determine training approach
- Work with SBCERA to develop critical success factors
- Determine training materials needed
- Outline training courses around objectives and determine instructional methods
- Determine methods and materials for training/learning evaluation (increase in knowledge, ability to apply new skills, etc.)

Develop Training Materials:

For PGRefresh Deliverables 2 and 3:

- Develop end-to-end business process training content; i.e., process overview, inputs and outputs, process steps that take place outside the system, how the current and new processes differ, etc.
- Work with SBCERA and LRS to develop materials to be used during user training, including instructor manuals and user guides
- Work with SBCERA to develop supplemental training materials as needed (e.g., for ad hoc, reinforcement training)
- Coordinate production of training materials, access to online materials, availability of other items required for training (e.g., white board, flipcharts)
- Assist with development of job aids (quick reference guides, etc.) for post-production support

Deliver Training:

For PGRefresh Deliverables 2 and 3:

- Manage set up of classroom facilities, ensure users can log on, have connectivity, etc.
- Coordinate and prepare SBCERA SME's to conduct process and system support training and provide support during classroom training and labs.
- Coordinate hands-on practice and develop/provide instruction for learners
- Assist with delivery of UAT and user training
- Deliver supplemental training as needed
- Work with SBCERA to conduct evaluations of learning and knowledge retention



DELIVERABLES

The following table lists the deliverables to be provided as part of this SOW:

| Deliverable | Description |
|---------------------------|---|
| Training Needs Assessment | Identifies performance requirements and the knowledge, skills, and abilities needed by users to achieve the project requirements and efficiently adopt the process improvements. |
| Training Objectives | Documents the goals and desired outcomes for the BPI projects and Deliverables 2 and 3. The Training Objectives document supports the business goals of the project, informs the training to be developed, and provides a method for measuring the success of process adoption and use. |
| Training Plan | Includes a list of training courses by role in support of training objectives, training approach, critical success factors, course descriptions, and dependencies. |
| Training Materials | This includes user guides, presentations, and instructor manuals for all training courses in scope. |
| Training Delivery | The Training Specialist will work with SBCERA and LRS to deliver training on end-to-end processes and process changes, and to determine evaluation methods and develop written evaluation materials. |

TEAM

Following lists the team and hours included in this Statement of Work:

| Team Member | Role | Rate | Hours | Total |
|------------------|-----------------------|----------|-------|-----------|
| Kimm Nasser-Fenn | Delivery Quality Lead | N/A | -- | -- |
| Lisa Vargas | Training Specialist | \$175.00 | 1,128 | \$197,400 |

PROJECT ASSUMPTIONS

- SBCERA will provide training facilities and equipment to support learners for all training in scope.
- SBCERA will provide workspace and internet access for the Linea Training Specialist while onsite. Linea agrees to be flexible about the nature of this space and will share space as required.
- Linea is expecting to work closely with SBCERA staff and LRS training staff in order to successfully complete the project.

SERVICE EXPECTATIONS

COMPLETION CRITERIA

The work in this Statement of Work is based on the delivery of listed deliverables.



DURATION

This Statement of Work is currently scheduled for twelve (12) months beginning on 7/1/22 and ending 6/30/23. If SBCERA requires support after 6/30/23, Linea will submit a change order to extend the contract.

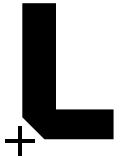
Travel is currently estimated at 14 trips to coincide with onsite meetings, training preparation, and classroom training.

PRICING

The table below lists the milestone payments, inclusive of travel.

| MS # | Milestone Deliverable | Completion Criteria | Estimated Billing Date | Milestone Billing Amount |
|------|--|---|------------------------|--------------------------|
| 1 | Training Needs Assessment Complete | Training Needs Assessment for all impacted staff delivered and approved. | 7/31/22 | \$19,740 |
| 2 | Training Objectives Complete | Training Objectives document delivered and approved. | 8/31/22 | \$19,740 |
| 3 | Deliverable 2 Training Plan Complete | Training Plan delivered and approved. | 9/30/22 | \$19,740 |
| 4 | Deliverable 2 Training Materials Complete | User guides, instructor manuals delivered. | 10/31/22 | \$19,740 |
| 5 | Deliverable 2 Training Complete | Classroom instruction delivered, evaluation methods determined, practice method established | 11/30/22 | \$19,740 |
| 6 | Deliverable 2 Training Evaluation Complete | Initial evaluation completed; methods for ongoing evaluation established | 12/31/22 | \$19,740 |
| 7 | Deliverable 3 Training Plan Complete | Training Plan delivered and approved. | 1/31/23 | \$19,740 |
| 8 | Deliverable 3 Training Materials Complete | User guides, instructor manuals delivered. | 3/31/23 | \$19,740 |
| 9 | Deliverable 3 Training Complete | Classroom instruction delivered, evaluation methods determined, practice method established | 4/30/23 | \$19,740 |

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SBCERA
6.29.2022

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| MS # | Milestone Deliverable | Completion Criteria | Estimated Billing Date | Milestone Billing Amount |
|-------|--|--|------------------------|--------------------------|
| 10 | Deliverable 3 Training Evaluation Complete | Initial evaluation completed; methods for ongoing evaluation established | 6/30/23 | \$19,740 |
| TOTAL | | | | \$197,400 |



ATTACHMENT 1: ESTIMATED SCHEDULE

| Task Name | Est. Start | Est. Finish |
|---|------------|-------------|
| Conduct Training Needs Assessment | | |
| Conduct interviews and analysis | 7/11/2022 | 7/22/2022 |
| Develop description of training needs | 7/15/2022 | 7/22/2022 |
| Identify gaps in knowledge and/or resources | 7/15/2022 | 7/22/2022 |
| Determine what will be needed to support training going forward | 7/20/2022 | 7/25/2022 |
| Document key findings and recommendations | 7/25/2022 | 7/28/2022 |
| Update existing Training Strategy as needed | 7/27/2022 | 7/29/2022 |
| Deliver Training Needs Assessment | 7/29/2022 | 7/29/2022 |
| Develop Training Objectives | | |
| Identify training groups | 7/18/2022 | 7/22/2022 |
| Define training goals for each group | 7/18/2022 | 7/25/2022 |
| Develop KPI's and determine measurement methods | 7/25/2022 | 7/28/2022 |
| Deliver Training Objectives document | 7/29/2022 | 7/29/2022 |
| Develop D2 Training Plan | | |
| Determine training approach | 7/25/2022 | 7/29/2022 |
| Work with SBCERA to develop critical success factors | 7/25/2022 | 7/29/2022 |
| Determine training materials needed | 8/1/2022 | 8/4/2022 |
| Outline training courses around objectives and determine instructional methods | 8/1/2022 | 8/4/2022 |
| Determine methods and materials for training/learning evaluation | 8/1/2022 | 8/4/2022 |
| Deliver D2 Training Plan | 8/5/2022 | 8/5/2022 |
| Develop D2 Training Materials | | |
| Develop end-to-end business process training content | 8/8/2022 | 8/19/2022 |
| Work with SBCERA and LRS to develop materials to be used during user training, including instructor manuals and user guides | 8/15/2022 | 8/26/2022 |
| Work with SBCERA to develop supplemental training materials as needed | 8/15/2022 | 8/26/2022 |
| Coordinate production of training materials, access to online materials, availability of other items required for training | 8/15/2022 | 8/26/2022 |
| Assist with development of job aids (quick reference guides, etc.) for post-production support | 8/29/2022 | 9/9/2022 |
| Deliver D2 Training Materials | 8/15/2022 | 9/9/2022 |
| Deliver D2 Training | | |
| Manage set up of classroom facilities | 8/1/2022 | 8/5/2022 |
| Coordinate and prepare SBCERA SME's to conduct training and provide support during classroom training and labs. | 8/8/2022 | 8/22/2022 |

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| | | |
|---|------------|------------|
| Coordinate hands-on practice and develop/provide instruction for learners | 8/22/2022 | 9/9/2022 |
| Assist with delivery of UAT and user training | 8/8/2022 | 8/19/2022 |
| Deliver supplemental training as needed | 8/29/2022 | 9/23/2022 |
| Work with SBCERA to conduct evaluations of learning and knowledge retention | 9/26/2022 | 10/28/2022 |
| Develop D3 Training Plan | | |
| Determine training approach | 11/1/2022 | 11/18/2022 |
| Work with SBCERA to develop critical success factors | 11/7/2022 | 11/18/2022 |
| Determine training materials needed | 11/21/2022 | 12/2/2022 |
| Outline training courses around objectives and determine instructional methods | 12/5/2022 | 12/16/2022 |
| Determine methods and materials for training/learning evaluation (increase in knowledge, ability to apply new skills, etc.) | 12/5/2022 | 12/16/2022 |
| Deliver D3 Training Plan | 1/6/2023 | 1/6/2023 |
| Develop D3 Training Materials | | |
| Develop end-to-end business process training content | 1/9/2023 | 1/20/2023 |
| Work with SBCERA and LRS to develop materials to be used during user training, including instructor manuals and user guides | 1/17/2023 | 1/27/2023 |
| Work with SBCERA to develop supplemental training materials as needed | 1/30/2023 | 2/10/2023 |
| Coordinate production of training materials, access to online materials, availability of other items required for training | 2/13/2023 | 2/24/2023 |
| Assist with development of job aids (quick reference guides, etc.) for post-production support | 3/1/2023 | 3/17/2023 |
| Deliver D3 Training Materials | 3/20/2023 | 3/31/2023 |
| Deliver D3 Training | | |
| Manage set up of classroom facilities, ensure users can log on, have connectivity, etc. | 4/3/2023 | 4/7/2023 |
| Coordinate and prepare SBCERA SME's to conduct training and provide support during classroom training and labs. | 3/27/2023 | 4/14/2023 |
| Coordinate hands-on practice and develop/provide instruction for learners | 4/10/2023 | 4/21/2023 |
| Assist with delivery of UAT and user training | 4/10/2023 | 4/10/2023 |
| Deliver supplemental training as needed | 4/24/2023 | 5/19/2023 |
| Work with SBCERA to conduct evaluations of learning and knowledge retention | 5/22/2023 | 6/30/2023 |