# Exhibit C2 – Deliverable Expectation Document

## Purpose

The purpose of this Exhibit is to describe the required contents of the Deliverable Expectation Document (DED). The Contractor must use this template during the Creating an Outstanding Retirement Experience (CORE): Pension Administration Modernization (PAM) Project, as described in **Exhibit C – Project Expectations, Section 4, Deliverable Expectations and Acceptance.**

## Instructions

Review and respond to the required questions within the template by typing directly into the fields to replace the instructional text with your content. When submitting the DED, this page may be omitted.

Using your own format is also acceptable if the requested information is readily identifiable by using headings or other means.

Work plans that support the Activity summary may be referenced and attached to support the methodology and schedule summary.

## Template

See template on the next page.

**Deliverable Expectation Document**
**for Company**

## Introduction

[Provide a brief overview defining the purpose of the Deliverable and how it fits within the overall completion of the Project. Indicate if there are pre-requisite tasks and subsequent tasks.]

## Deliverable Description

[Describe the Deliverable’s objectives and scope. Discuss the level of detail to be provided such as “will describe the rationale for design decisions, will provide a textual summary of the design with detailed design pseudocode in the appendices, will include database schema diagrams and database table relationships, field sizes and descriptions, and indices and keys.” Discuss the intended audience. If the document assumes a specific knowledge level, list the key concepts that must be understood (for example, understanding of backup rotation schedules, understanding of registry editing, etc.). Do not use vague terms such as “basic knowledge of system administration”.]

### Methodology for Creating the Deliverable

[Provide a brief explanation of the Activities, tasks and methods to be used to develop the Deliverable. If appropriate, include a process flow diagram. Do not duplicate methodologies described elsewhere (for example, if the design methodology was described in detail in the Proposal and Project Management Plan, reference the appropriate document section). Indicate if there are any assumptions or constraints on the development of the Deliverable. In cases where the Contractor’s methodologies differ significantly from the DRS’, it may be appropriate to require the Contractor to provide a mapping of their methodology to the DRS’ methodology (as an appendix to the DED and/or the Deliverable).]

### Applicable Standards

[List the specific industry and/or government standards which must be observed. Do not simply list “industry standards” or “IEEE”. Indicate if the format/order of the standard must be observed or if the Contractor may provide a mapping of their format to the standard to show compliance.]

### Table of Contents

[List the table of contents or outline of the document. Include an introduction, followed by sections. Discuss the content of each major section. Where appropriate or as requested by the Project, provide a sample of this document from other engagements/projects or sample content, level of detail and format of key sections. Include any Appendices at the end.]

### Deliverable Format

[List any required templates, diagrams, tables or specific content required for this Deliverable. For instance, in design and test Deliverables, an updated Requirements Traceability Matrix should be included in the final Deliverable. Indicate the format of the document and any associated diagrams, spreadsheets (for example, MS Word, MS Visio, MS Project, etc.). Estimate the length/size of the document, and number of copies to be delivered.]

## Deliverable Acceptance Criteria

### Were Requirements Met?

* Were the Requirements met? Choose an item.
* Explanation: Click or tap here to enter text.

### Minimum Acceptance Criteria

The following are minimum acceptance criteria:

**Table 1 - Minimum Acceptance Criteria**

| **Minimum Acceptance Criteria** | **Answer** | **Comment** |
| --- | --- | --- |
| Does the Deliverable comply with the applicable standards from **Section 2.2**? | Choose an item. | Click or tap here to enter text. |
| Are all requirements from **Section 2.4** met? | Choose an item. | Click or tap here to enter text. |
| Does the Deliverable comply with the stated format requirements from **Section 2.4**? | Choose an item. | Click or tap here to enter text. |
| Is the Deliverable consistent with other Deliverables already approved? | Choose an item. | Click or tap here to enter text. |
| Does the Deliverable meet the general review criteria (for example, pages numbered, free of formatting and spelling errors, clearly written, no incomplete sections, etc.)? | Choose an item. | Click or tap here to enter text. |

### Additional Acceptance Criteria

[List the specific additional acceptance criteria for the Deliverable. The criteria should be specific to the Deliverable and indicate key needs of the Project (for example, must include detailed description of database sizing, growth considerations, performance considerations, and de-/normalization considerations). Other general review criteria (which are primarily the same for all Deliverables) may be referenced or attached.]

## Deliverable Schedule

### Key Deliverable Dates

[List the key Activities and due dates in the preparation and review of this Deliverable. If appropriate, list key meetings, walkthroughs, inspections and reviews. These tasks should be consistent with the Activities and dates in the workplan and contractual timeframes regarding Deliverable delivery, review and approval/rejection. Include time for DRS’ review of the Deliverable and Contractor incorporation of comments. Indicate if any Activities or dates are on the critical path or have significant dependencies. The following is a sample to update or replace.]

**Table 2 - Key Activities**

| **Key Activity** | **Due Date** | **Comment** |
| --- | --- | --- |
| DED Approval | xx/xx/20xx\* |  |
| Internal Walkthrough with Project |  |  |
| Draft Deliverable Submitted |  |  |
| DRS’ Review of Draft |  | Minimum of one (1) week |
| Walkthrough of Draft with Stakeholders |  |  |
| Deadline for Comments on Draft |  |  |
| Contractor Incorporation of Comments |  |  |
| Final Deliverable Submitted |  |  |
| DRS’ Review of Final Deliverable |  | Minimum of one (1) week |
| Deliverable Approval |  |  |
| Contractor Incorporation of Final Comments (if necessary) |  |  |

\* Critical Date

### Schedule for Deliverable Updates

[If the Deliverable is expected to be updated on a periodic basis, list the proposed schedule of updates and tentative time frames. Dates may be either “hard dates” (for example, March 5, 2023) or “soft dates” (30 days prior to System Test). If appropriate, reference the appropriate Project or Operating Agreement requirement for the update.]

***Table 3 - Deliverables Update Schedule***

| **Reason for Deliverable Update** | **Agreement Reference** | **Due Date** | **Comment** |
| --- | --- | --- | --- |
|  |  | xx/xx/20xx |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Signatures

This Deliverable Expectation Document has been agreed to by all of the undersigned parties.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Wendy Helling

CORE: PAM Senior Project Manager

Department of Retirement Systems

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Name]

Bidder Project Manager

[Bidder Company]