

Delivery Consultant Scope of Work

Task 1. Project Delivery and Management (Delivery Consultant Lead)

- **Roles and Responsibilities**
 - Ava: Provides overall project direction. Task leads (Ava staff assigned to lead tasks not led by the Delivery Consultant) develop and maintain individual workplans and are responsible for completing assigned activities and deliverables.
 - Delivery Consultant: Facilitates workplan development, maintains the integrated project schedule, and coordinates and tracks progress across workstreams.
- **Consultant activities include:**
 - Develop a standardized task-level workplan template and facilitate workplan development with Ava task leads.
 - Collect and consolidate task-level workplans into an integrated project workplan and schedule and track progress against task-level and overall project milestones, dependencies, and deliverables.
 - Coordinate activities and handoffs across Ava staff and consultants.
 - Track progress, support timely project execution, and participate in weekly coordination meetings with Ava's customer programs strategy leadership team hereafter referenced as the "Tiger Team".
- **Deliverable(s):** 1. Integrated workplan and schedule, 2. Task-level workplan template, and 3. Task-level workplan for each Consultant-led task.

Phase 1 - Strategic Framework

Task 2: Support Refinement of Strategic Framework Objective and Priorities (Support)

- **Roles and Responsibilities**
 - Ava: Leads development of the Strategic Framework objective and priorities, coordinates Tiger Team review, and determines final direction.
 - Delivery Consultant: Reviews existing materials and provides recommendations to inform refinement of the objective and priorities.
- **Consultant activities include:**
 - Review member agency feedback and relevant existing documents.
 - Review and provide input on proposed updates to Strategic Framework objective and priorities.
- **Deliverable(s):** Consolidated comments and recommendations.

Task 3: Develop Strategic Framework Metrics (Delivery Consultant Lead)

- **Roles and Responsibilities**
 - Ava: Coordinates Tiger Team review and approves final metrics.
 - Delivery Consultant: Leads research, development, and refinement of proposed metrics.

- Consultant activities include:
 - Research relevant metrics used by other organizations.
 - Develop 6-10 potential metrics and assess their applicability to Ava.
 - Refine recommended metrics based on Tiger Team input.
- **Deliverable(s):** Metrics recommendation memo.

Task 4. Develop Methodology for Evaluating Portfolio Composition Targets (Delivery Consultant Lead)

- Roles and Responsibilities
 - Ava: Provides input on the proposed methodology, coordinates Tiger Team review, and approves the final approach.
 - Delivery Consultant: Develops and refines the methodology for evaluating alternative portfolio composition targets.
- Consultant activities include:
 - Develop a high-level methodology for estimating how alternative portfolio composition targets perform against Strategic Framework objectives, priorities, and metrics.
 - Identify data requirements, assumptions, and approaches for evaluating tradeoffs across alternative portfolio compositions.
 - Refine the methodology based on Ava input.
 - Document the final methodology.
- **Deliverable(s):** Portfolio composition target evaluation methodology memorandum, including proposed evaluation approach, data requirements, and assumptions.

Task 5. Evaluate Portfolio Scenarios (Delivery Consultant Lead)

- Roles and Responsibilities
 - Ava: Provides direction on alternative portfolio composition targets to be evaluated, reviews analytical findings, and selects the final targets.
 - Delivery Consultant: Collaborates with Ava to develop alternative portfolio composition targets, applies the approved methodology from Task 4, develops comparative scorecards, and refines the analysis based on Ava feedback.
- Consultant activities include:
 - Collaborate with Ava to develop up to five alternative sets of portfolio composition targets reflecting different allocations of future program investments across customer segments, focus areas, and other strategic priorities.
 - Apply the approved methodology to evaluate each alternative against Strategic Framework objectives, priorities, and metrics.
 - Develop comparative scorecards documenting results, assumptions, and tradeoffs.
 - Refine the analysis based on Ava feedback or changes to objectives and priorities.
- **Deliverable(s):** Portfolio scenario evaluation workbook and summary of findings.

Task 6. Support Internal Stakeholder Engagement on Portfolio Scenarios (Delivery Consultant Support)

- Roles and Responsibilities
 - Ava: Provides strategic direction, reviews internal engagement materials, and coordinates internal and Board/CAC engagement.
 - Delivery Consultant: Develops the analytical content needed to communicate portfolio scenarios and inform internal stakeholder discussions.
 - Engagement Consultant: Leads external engagement planning, facilitation, and synthesis of external stakeholder feedback.
- Consultant activities include:
 - Coordinate with the Engagement Consultant to identify content needed for internal engagement activities as needed.
 - Provide substantive input into materials used to engage the Board, CAC, member agencies, and internal stakeholders on portfolio scenarios.
 - Review synthesized internal stakeholder feedback and identify implications for portfolio scenarios.
 - Implement Ava-directed revisions to up to 3 scenarios, including updates to scorecards and supporting analysis.
 - Incorporate consolidated Ava feedback into revised scenarios
- **Deliverable(s):** 1) Consolidated comments on internal stakeholder engagement materials, and 2) Revised portfolio scenario evaluation workbook, including updated scorecards and supporting analysis for up to three scenarios.

Phase 2 - Adaptive Program Portfolio

Task 7. Market Assessment and Program Opportunity Identification

- Roles and Responsibilities
 - Ava: Leads the comprehensive market assessment, including policy, regulatory, funding, and other relevant market considerations. Provides strategic direction and determines which program opportunities warrant further consideration.
 - Delivery Consultant: Leads the regional program inventory assessment and national and international program research to identify service territory gaps and potential program concepts.
- Consultant activities include:
 - Regional Program Inventory Assessment
 - Identify and inventory relevant customer programs currently offered within Ava's service territory, including programs administered by Ava and other program administrators.
 - Develop a consistent approach to classifying programs by relevant characteristics, such as focus area, customer segment, and program offering.
 - Assess the regional inventory to identify gaps, overlaps, and areas of existing program coverage.

- Summarize findings to inform Ava's broader market assessment and program concept development.
 - National and International Program Research
 - Identify and research up to 15 national and international programs that offer approaches not currently available, or not widely available, within Ava's service territory.
 - Conduct up to five targeted interviews with program administrators or other relevant experts, as appropriate.
 - Assess program approaches, reported outcomes, and potential applicability to Ava's customers and service territory.
 - Identify promising approaches that could inform potential Ava program concepts.
- **Deliverable(s):** 1) Regional program inventory and gap assessment, including program classifications and summary findings, and 2) National and international program research summary, including applicability assessments and potential program concepts.

Task 8. Focus Area Strategy Development (Delivery Consultant Support)

- Roles and Responsibilities
 - Ava: Focus area Subject Matter Experts (SMEs) lead development of the strategic direction and theory of change for their respective focus areas and determine final recommendations.
 - Delivery Consultant: Develops a general focus area strategy development framework, facilitates working sessions, and documents the resulting focus area strategies.
- Consultant activities include:
 - Review findings from Ava's existing portfolio, market, regulatory, and operational assessments to develop one general focus area strategy development framework.
 - Develop and facilitate up to five two-hour structured working sessions with Ava SMEs to guide discussion of long-term strategic direction, including desired market outcomes, priority market barriers, Ava's role and points of intervention, and the logic connecting interventions to outcomes.
 - Document the strategic direction and theory of change for each of the five focus areas developed by Ava SMEs and refine based on consolidated Ava feedback.
- **Deliverable(s):** 1) Focus area strategy development framework and 2) Focus area strategy documents.

Task 9. Review, Develop, and Finalize Program Concept Inventory (Delivery Consultant Lead)

- Roles and Responsibilities
 - Ava: Provides program concepts identified through engagement, establishes screening criteria, and determines which concepts advance.

- Delivery Consultant: Screens and develops concepts using Ava screening criteria, consolidates viable concepts into an inventory, and documents the approach used.
- Consultant activities include:
 - Compile program concepts identified through member agency, external engagement, and other channels as provided by Ava staff.
 - Apply Ava's screening criteria and identify concepts for further consideration
 - Further develop viable concepts, as needed, to establish a consistent level of detail.
 - Consolidate up to 16 viable concepts into a unified inventory and document the approach used to screen and develop them.
 - Refine the inventory based on consolidated Ava feedback.
- **Deliverable(s):** Final program concept inventory, including standardized concept profiles and a summary of the screening and development approach.

Task 10. Estimate Impacts of Potential Program Concepts (Delivery Consultant Lead)

- Roles and responsibilities
 - Ava: Develops impact-estimation methodologies, reviews preliminary estimates, and approves final estimates.
 - Delivery Consultant: Leads impact estimation for viable program concepts and documents the supporting data, assumptions, and results.
- Consultant activities include:
 - Apply established impact-estimation methodologies to up to 16 viable program concepts.
 - Document data sources, assumptions, calculations, and estimated impacts.
 - Refine estimates based on Ava feedback and additional or alternative data, as available.
 - Finalize impact estimates for incorporation into the Customer Programs Strategy.
- **Deliverable(s):** Program concept impact-estimation workbook, including final estimates, supporting calculations, data sources, and assumptions.

Task 11. Develop and Finalize the Customer Programs Strategy and Adaptive Portfolio Document (Delivery Consultant Lead)

- Roles and Responsibilities
 - Ava: Provides strategic direction, coordinates Tiger Team review, and approves the final Strategy and Adaptive Portfolio.
 - Delivery Consultant: Leads development of the draft document, incorporates Ava feedback, and produces the final document.
- Consultant activities include:
 - Synthesize findings, analyses, and task-specific memoranda into a draft Customer Programs Strategy and Adaptive Portfolio document.
 - Incorporate consolidated Tiger Team feedback into the draft.
 - Circulate a revised draft for Ava review and incorporate final direction.

- Prepare the final document and supporting appendices.
- **Deliverable(s):** Draft and final Customer Programs Strategy and Adaptive Portfolio.