

STATE OF CALIFORNIA



REQUEST FOR PROPOSAL (RFP)

Incorporates Addendum Numbers 1-4

for

IT CONSULTING SERVICES

RFP 5137001

26 June 2013

State of California
Department of General Services
Procurement Division
Multiple Awards Program Section
707 Third Street, 2nd Floor South
West Sacramento, CA 95605-2811

ATTACHMENT 1
STATEMENT OF WORK (SOW)

INSTRUCTIONS:

1. Read the 7 classification descriptions below.
2. Check "Yes" to agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for each classification checked. A blank or "No" response for a classification shall be considered that the bidder is not competing in that classification.
3. Sign certification at the end of this form to certify that Bidder has read, understood and agree to comply with this Attachment 1, Statement of Work (SOW), for the classifications checked. An unsigned SOW shall be rejected.

- A. The work to be performed under this Agreement shall be in accordance with the base MSA. Certifications and resumes will be required at the RFO level.
- B. This MSA will commence on **September 1, 2013** or upon signature approval by DGS, whichever is later, and contractor shall not begin work before that time for a user agency. This MSA shall expire **August 31, 2016**.
- C. **AWARDED CLASSIFICATIONS**

Contractor shall provide services in the approved classifications listed below.

1. **SENIOR PROJECT MANAGER (PM) INFORMATION TECHNOLOGY (IT)**

A senior PM IT has full responsibility to manage and oversee all aspects of the most complex IT projects to deliver an IT product, service or system. This includes but is not limited to managing both external and internal IT project teams, and interacting with department heads, agency secretaries at the user agency, State control agencies, and individuals of similar status and capacity in the private sector. The senior PM performs duties and tasks and applies common knowledge, skills and abilities/competencies as follows:

a. **General Duties/Tasks**

- i. Determines appropriate products or services with clients or customers to define project scope, requirements and deliverables;
- ii. Develops, modifies or provides input to project plans;
- iii. Implements project plans to meet objectives;
- iv. Coordinates and integrates project activities
- v. Manages, leads or administers project resources;
- vi. Monitors project activities and resources to mitigate risk;
- vii. Implements or maintains quality assurance processes;
- viii. Makes improvements, solves problems or takes corrective action when problems arise;
- ix. Gives presentations or briefings on all aspects of the project;
- x. Participates in phase, milestone and final project reviews;
- xi. Identifies project documentation requirements or procedures;

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- xii. Develops and implements project schedules and release plans.
- b. IT Duties and Tasks**
- i. Identifies customers' information systems requirements;
 - ii. Analyzes information systems requirements or environment;
 - iii. Designs or conducts analytical studies, feasibility studies, cost-benefit analyses or other research;
 - iv. Evaluates, monitors or ensures compliance with laws, regulations, policies, standards or procedures;
 - v. Purchases or contracts for IT services, equipment, products, supplies, property or other items;
 - vi. Integrates information systems and/or subsystems;
 - vii. Develops information systems testing strategies, plans or scenarios;
 - viii. Identifies standards or requirements for infrastructure configuration or change management;
 - ix. Participates in change control (for example, reviewing configuration change requests);
 - x. Develops or implements information systems security plans and procedures; and
 - xi. Ensures appropriate product-related training and documentation are developed and made available to customers.
- c. General Knowledge Skills and Abilities (KSAs)/Competencies**
- Customer service, decision making, flexibility, interpersonal skills, leadership; legal, government and jurisprudence; oral communication, organizational awareness, problem solving, reasoning, team building, and speaking and writing.
- d. Technical KSAs/Competencies**
- Business process reengineering, capital planning and investment assessment, contracting/procurement, cost-benefit analysis, financial management, planning and evaluating, project management, quality assurance, requirements analysis and risk management.
- e. IT KSAs/Competencies**
- Configuration management, data management, information management, information resources strategy and planning, information technology architecture, information technology performance assessment, infrastructure design, systems integration, systems life cycle and technology awareness.

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f. **Experience**

This classification requires a minimum of seven (7) years of broad, extensive and increasingly responsible experience applying PM principles, methods, techniques, and tools. At least four (4) years of that experience must have been as a senior PM of one or more large or complex IT project.

g. **Education**

This classification requires the possession of (a) a Bachelor's Degree from an accredited college or university, and (b) a Project Management Professional (PMP) certification from the Project Management Institute (PMI), which will be verified during the RFO process.

- | |
|---|
| <p><input type="checkbox"/> <i>Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Senior Project Manager classification.</i></p> <p><input type="checkbox"/> <i>No, I am not competing in this classification.</i></p> |
|---|

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2. **PROJECT MANAGER (PM)**

The PM usually works under the direction of a senior PM or user agency personnel and manages or oversees all aspects of one or more IT projects while interacting with mid-level officials of similar capacity at the user agency and private sector. The PM performs duties and tasks and applies common knowledge, skills and abilities/competencies as follows:

a. **Duties/Tasks**

See general and IT duties and tasks listed for the senior PM above.

b. **KSAs/Competencies**

See the KSAs/competencies listed for the senior PM above.

c. **Experience**

This classification requires a minimum of five (5) years of broad, extensive and increasingly responsible PM project experience applying project management (PM) principles, methods, techniques, and tools. At least three (3) years of that experience must have been in a lead capacity.

d. **Education**

This classification requires the possession of (a) a Bachelor's Degree from an accredited college or university, and (b) a Project Management Professional (PMP) certification from the Project Management Institute (PMI), which will be verified during the RFO process.

Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Project Manager classification.

No, I am not competing in this classification.

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3. **SENIOR TECHNICAL LEAD (TL)**

A senior TL ensures IT architectural integrity and functions as the interface between systems developers and IT project managers. The senior TL provides coordination, oversight and leadership for the analyses, planning, design, implementation, documentation, assessment, and management of IT architecture and infrastructure design framework to align IT approaches with an organization's mission, goals and business processes. Common organizational or functional industry position titles for technical leads include but are not limited to chief or senior enterprise architects, system architects, IT architects, systems designers, enterprise architects and solutions architects.

a. **Duties/Tasks**

- i. Develop reference models of the enterprise and maintain the information in the IT repository;
- ii. Determine the gaps between the current and the target architecture and develop plans for transitioning to target architecture;
- iii. Define the policies and principles to guide technology decisions for the enterprise architecture;
- iv. Identify opportunities to improve enterprise-level systems to support business processes and utilize emerging technologies;
- v. Promote and educate customers and stakeholders on the use and value of the enterprise architecture;
- vi. Provide enterprise architecture guidance, support and coordination to customers and IT project teams;
- vii. Document the enterprise architecture infrastructure, including the business units and key processes, using modeling techniques;
- viii. Ensure technical integration is achieved across the enterprise by participating in test planning, validation and reviews;
- ix. Evaluate the impact of enterprise architecture products and services on IT investments, business operations, stakeholder satisfaction and other outcomes;
- x. Coordinate and conduct governance and portfolio management activities associated with ensuring compliance with the enterprise architecture; and
- xi. Ensure the rigorous application of information security/information assurance policies, principles and practices to all components of the enterprise architecture.

b. **KSAs/Competencies**

- i. Organizational mission, IT infrastructure, State enterprise architecture principles and reference models, and program management principles sufficient to participate in the development of organizational enterprise architecture goals, objectives, plans and policies;

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- ii. Organizational enterprise architecture models, policies and planning formulation process, strategic and IT goals and objectives, and IT program metrics and measurement techniques sufficient to ensure enterprise-level IT specifications align with the organizational business requirements, identify potential improvements to enterprise architecture to meet organizational goals, and establish and implement metrics for evaluating the accomplishments of enterprise architecture goals and objectives;
- iii. Methods and approaches for sharing information through the use of IT assets, project management concepts, methods and practices, enterprise architecture concepts and principles, and multiple IT disciplines sufficient to develop major components of the enterprise architecture plan including strategic drivers, current and target architectures, the sequencing plan, architectural segments and reference models and standards;
- iv. Technical documentation methods; and
- v. Speak and write effectively and prepare effective reports.

c. Experience

This classification must have a minimum of seven (7) years of experience aligning IT systems with organizational business processes. At least four (4) years of that experience must have been in a lead capacity.

d. Education

This classification requires the possession of a Bachelor's Degree in an IT related or Engineering field from an accredited college or university.

- Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Senior Technical Lead classification.*
- No, I am not competing in this classification.*

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4. TECHNICAL LEAD (TL)

The description is the same as with the senior TL, except this classification functions under general supervision of a senior TL or Senior PM.

a. **Duties/Tasks**

See duties and tasks listed for the senior TL above.

b. **KSAs/Competencies**

See KSAs/Competencies listed for the senior TL above.

c. **Experience**

This classification must have a minimum of five (5) years of experience aligning IT systems with organizational business processes. At least three (3) years of that experience must have been in a lead capacity.

d. **Education**

This classification requires the possession of a Bachelor's Degree in an IT related or Engineering field from an accredited college or university.

Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Technical Lead classification.

No, I am not competing in this classification.

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5. **SENIOR PROGRAMMER**

A senior programmer is responsible for leading and/or working on the most complex IT applications design, documentation, development, modification, testing, installation, implementation and support of new or existing applications software. This classification may also plan, install, configure, test, implement and manage a systems environment in support of an organization's IT architecture and business needs. Common organizational or functional industry position titles for programmers include but are not limited to programmer analyst, applications developer, software engineer, software developer, software quality assurance specialist, systems programmer, systems software programmer, database administrators, computer systems analysts, systems engineer, systems software engineer.

a. **Duties/Tasks (Applications Software)**

- i. Analyzing and refining systems requirements;
- ii. Translating systems requirements into applications prototypes;
- iii. Planning and designing systems architecture;
- iv. Writing, debugging and maintaining code;
- v. Determining and designing applications architecture;
- vi. Determining output media/formats;
- vii. Designing user interfaces;
- viii. Working with customers to test applications;
- ix. Assuring software and systems quality and functionality;
- x. Integrating hardware and software components;
- xi. Writing and maintaining program documentation;
- xii. Evaluating new applications software technologies; and/or
- xiii. Ensuring the rigorous application of information security/information assurance policies, principles and practices to the delivery of application software services.

b. **Duties/Tasks (Operating Systems)**

- i. Analyzing systems requirements in response to business requirements, risks and costs;
- ii. Evaluating, selecting, verifying and validating the systems software environment;
- iii. Evaluating, selecting and installing compilers, assemblers and utilities;
- iv. Integrating hardware and software components within the systems environment;
- v. Monitoring and fine-tuning performance of the systems environment;
- vi. Evaluating new systems engineering technologies and their effect on the operating environment; and/or
- vii. Ensuring that information security/information assurance policies, principles and practices are an integral element of the operating environment.

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c. KSAs/Competencies

- i. Applications software development principles and methods sufficient to participate in the design, development, testing and implementation of new or modified applications software;
- ii. Operating systems installation and configuration procedures;
- iii. Organization's operational environment;
- iv. Software design principles, methods and approaches
- v. Principles, methods and procedures for designing, developing, optimizing and integrating new and/or reusable systems components;
- vi. Pertinent government regulations;
- vii. Infrastructure requirements, such as bandwidth and server sizing;
- viii. Database management principles and methodologies, including data structures, data modeling, data warehousing and transaction processing;
- ix. Functionality and operability of the current operating environment;
- x. Systems engineering concepts and factors such as structured design, supportability, survivability, reliability, scalability and maintainability;
- xi. Optimization concepts and methods.
- xii. Establish and maintain cooperative working relationships with those contacted in the course of the work; and
- xiii. Speak and write effectively and prepare effective reports.

d. Experience

This classification must have a minimum of seven (7) years of experience in electronic data processing systems study, design, and programming. At least four (4) years of that experience must have been in a lead capacity.

e. Education

This classification requires the possession of a Bachelor's Degree in an IT related or Engineering field from an accredited college or university.

- Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Senior Programmer classification.*
- No, I am not competing in this classification.*

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6. **PROGRAMMER**

The description is the same as with the senior programmer, except this classification functions under general supervision.

a. **Duties/Tasks**

See duties and tasks listed for the senior programmer above.

b. **KSAs/Competencies**

See KSAs/Competencies listed for the senior programmer above.

c. **Experience**

This classification must have a minimum of five (5) years of experience in electronic data processing systems study, design, and programming. At least three (3) years of that experience must have been in a lead capacity.

d. **Education**

This classification requires the possession of a Bachelor's Degree in an IT related or Engineering field from an accredited college or university.

Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Programmer classification.

No, I am not competing in this classification.

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7. **SYSTEMS ANALYST (SA)**

A SA performs systems analysis and is responsible for work that involves applying analytical processes to the planning, design and implementation of new and improved information systems to meet the business requirements of customer organizations. Common organizational or functional industry position titles for systems analysis include but are not limited to SA, business analyst and solutions architect, staff/senior information systems analysts.

a. **Duties/Tasks**

- i. Perform needs analyses to define opportunities for new or improved business process solutions;
- ii. Consult with customers to identify, refine and specify functional requirements, and translate functional requirements into technical specifications;
- iii. Develop overall functional and systems requirements and specifications;
- iv. Conduct business process reengineering;
- v. Conduct feasibility studies and trade-off analyses;
- vi. Prepare business cases for the application of IT solutions;
- vii. Define systems scope and objectives
- viii. Develop cost estimates for new modified systems;
- ix. Ensure the integration of all system components; e.g., procedures, databases, policies, software and hardware;
- x. Plan systems implementation; and/or
- xi. Ensure the rigorous application of information security/information assurance policies, principles and practices to the systems analysis process.

b. **KSAs/Competencies**

- i. Systems analysis and analytical principles, concepts, techniques and methods, including cost-benefit analysis methods;
- ii. Basic IT architecture and technical documentation methods;
- iii. Systems design tools, methods and techniques, including automated systems analysis and design tools sufficient to develop requirements and specifications for systems that meet business requirements;
- iv. Systems design standards, policies and authorized approaches sufficient to assist in identifying and specifying business requirements for new or enhanced systems and develop basic system specifications;
- v. System design precedents or alternative approaches sufficient to advise on the merits of proposed systems development projects;
- vi. Structured analysis principles and methods;

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- vii. Business processes and operations of customer organizations sufficient to apply a structured systems analysis approach to the design and development of new or enhanced applications;
 - viii. Business process engineering concepts and methods sufficient to lead/conduct studies designed to identify potential improvements in the way IT is applied to key business functions;
 - ix. Life cycle management concepts;
 - x. Internet and new IT technologies; and
 - xi. Speak and write effectively and prepare effective reports.
- c. **Experience**
- This classification must have a minimum of five (5) years of experience applying analytical processes on IT projects. At least three (3) years of that experience must have been in systems analysis and design.
- d. **Education**
- This classification requires the possession of a Bachelor's Degree in an IT related or Engineering field from an accredited college or university.

Yes, I agree to provide qualified staff to perform the duties described and meeting the minimum education and experience requirements for the Systems Analyst classification.

No, I am not competing in this classification.

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CERTIFICATION OF UNDERSTANDING OF
ATTACHMENT 1 – STATEMENT OF WORK (SOW)

As the person authorized to represent and contractually bind the bidder to the RFP 5137001 requirements, I certify that I have read, understood and agree to comply with this Attachment 1, Statement of Work (SOW), for the classifications that I have checked above.

BIDDER NAME	
SIGNATURE	DATE
PRINT NAME OF PERSON SIGNING	
PRINT TITLE OF PERSON SIGNING	