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**MASTER SERVICE AGREEMENT  
USER INSTRUCTIONS**

<b>CONTRACT NUMBERS: 5-06-70-24 -- 5-06-70-48 and 5-06-70-50 -- 5-06-70-142</b>
<b>CONTRACT TERM: July 1, 2006 through June 30, 2009</b>
<b>SERVICE: INFORMATION TECHNOLOGY CONSULTING SERVICES</b>
<b>DISTRIBUTION CODE: Electronic version of all documents associated with this MSA can be found on the DGS/PD Internet web page: <a href="http://www.pd.dgs.ca.gov/masters/itconsulting">http://www.pd.dgs.ca.gov/masters/itconsulting</a></b>
<b>USER INSTRUCTIONS EFFECTIVE DATE: July 1, 2006</b>

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**INFORMATION TECHNOLOGY CONSULTING SERVICES**

**USER INSTRUCTIONS**

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## I. INTRODUCTION AND GENERAL INFORMATION

This Information Technology (IT) Consulting Master Services Agreement (MSA) provides professional consultant services. To help you achieve your IT Consulting Project objectives the State of California makes this MSA available to State and local government agencies; each local agency should make its own determination of whether using these competitively bid contracts is consistent with its procurement policies and regulations.

The intent of establishing this MSA is to expedite the process used to obtain contractors for IT consulting services. Each ordering department is responsible for the following:

- Development of a Statement Of Work (SOW) for the project. The SOW identifies all order related issues and deliverables contained in the "Request For Offer (RFO)" sent to contractors within the selected MSA service subcategory;
- Evaluation of the contractors' SOW response(s) to the RFO and rationale for selection;
- Choice of the contractor best meeting the user department requirements.
- Feasibility Study Report (FSR) and Certification of Compliance;
- Government Code (GC) §19130 standards for the use of personal services contracts justification.

*NOTE: The user department manages the project, approves the deliverables, and authorizes payment to the contractor.*

Local agency requirements are listed at the end of this section. (Section I.Q)

### A. STATE CONTRACT ADMINISTRATOR

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### B. CONTRACTOR REQUIRED CERTIFICATIONS

The Senior Project Manager and Project Manager classifications require a Project Management Professional (PMP) certificate from the Project Management Institute (PMI). The PMP certificate must be verified with the contractor's response to the RFO released by the user department.

### C. MSA ORDER LIMITS

The order limit is \$500,000 per individual order. However, this MSA can be used for orders above \$500,000 with prior approval from DGS Procurement Division (PD). See Section II B. FOR ORDERS IN EXCESS OF \$500,000.

#### **D. PRICING**

1. The contractor rates listed in Section IV, CONTRACTORS HOURLY RATE SCHEDULES are the maximum rates that can be charged and are fixed for the term of this MSA. The RFO process is intended to promote further competition based on a specific statement of work.
2. DGS may consider a rate increase during the first quarter at the end of the initial three-year contract term only upon formal request by the contractor to the DGS administrator. Any revised rate(s) will be published by DGS.

#### **E. PAYMENT**

Ordering agencies must comply with GC §927 and pay undisputed invoices within the required 45 days. State agencies may also make progress payments to contractors for work performed until the final deliverable is received and accepted. If progress payments are included in the agency's order, the agency shall retain ten percent (10%) of fees billed pending completion of the entire project (PCC §10346 and §12112).

#### **F. DGS ADMINISTRATIVE FEE**

The DGS charges each user an administrative fee for using this MSA. The fee is a percentage of each total contract amount. The current fee schedule is located at; <http://www.ofs.dgs.ca.gov/Price+Book/P/Purchasing.htm>. The fee is not included in the contractor's hourly rates for this MSA. The Multiple Award Program Section (MAPS) will bill each user directly for the administrative fee.

#### **G. PROJECT RELATED EXPENSES**

Contractor personnel must be available to be interviewed and to work statewide. Any travel related costs must be included in a contractor's response to the RFO and considered in the evaluation by the requesting department. Approved travel costs may not exceed the current Department of Personnel Administration (DPA) travel and per diem rates.

#### **H. PROFESSIONAL ERRORS AND OMISSIONS INSURANCE**

Some orders issued under this MSA may require the contractor to provide proof of Professional Errors and Omissions Insurance covering any damages caused by an error, omission or any negligent acts. The ordering department shall determine the minimum limits of the Professional Errors and Omissions Insurance to be provided at no cost to the user department.

#### **I. PERSONNEL WORKING ON PROJECTS**

Contractors must include the names, classifications, certifications (if applicable) and resumes of personnel, including sub contractors, who will be assigned to the project. If a contractor's offer includes subcontractors, the hourly rates and MSA classification **must** be listed. The sub contractor's rates **cannot** be higher than the prime contractor's published MSA rates. NOTE: The Senior Project Manager and Project Manager classifications require a Project Management Professional (PMP) certificate from the Project Management Institute (PMI).

## **J. TERM OF MSA**

The term of this MSA is July 1, 2006 through June 30, 2009—three (3) years with two one-year optional extensions. User department's contracts that are in place before the end of the MSA term may continue for twelve (12) months beyond the MSA contract period.

## **K. FINANCIAL SECURITY**

### **1. Progress Payments /Performance Bonds**

For projects issued under this MSA, contractors may be required to post a bond in the name of the ordering department prior to starting the project as required in accordance with PCC §12112: Any contract for IT goods or services, to be manufactured or performed by the contractor especially for the state and not suitable for sale to others in the ordinary course of the contractor's business may provide, on the terms and conditions that the department deems necessary to protect the state's interest, for progress payments for work performed and costs incurred at the contractor's shop or plant, provided that not less than 10 percent of the contract price is required to be withheld until final delivery and acceptance of the goods or services, and provide further, that the contractor is required to submit a faithful performance bond, acceptable to the user department, in a sum not less than one-half of the total amount payable under the contract securing the faithful performance of the contract by the contractor.

### **2. Liability Insurance**

NOTE: The State will not be responsible for any premium or assessments on the policy.

Contractor shall furnish to the State a certificate of insurance stating that there is liability insurance presently in effect, for the Contractor of not less than \$1,000,000 per occurrence for bodily injury and property damage liability combined.

The certification of insurance must include the following provisions:

- a. The insurer will not cancel the insured's coverage without 30 days prior written notice to the State;
- b. The State of California is included as additional insured.

Contractor agrees that the liability insurance herein provided for shall be in effect at all times during the term of this contract (including all MSA release orders). In the event said insurance coverage expires at any time during the term of this contract, Contractor agrees to provide at least 30 days prior to said expiration date, a new certificate of insurance evidencing insurance coverage as provided for herein for not less than the remainder of the term of the contract, or for a period of not less than one year. New certificates of insurance are subject to the approval of the Department of General Services, and Contractor agrees that no work shall be performed prior to approval. In the event the Contractor fails to keep in effect at all times insurance coverage as herein provided, the State may, in addition to any other remedies, terminate this contract.

Ordering departments should request a copy of the Liability Insurance certificate at the time of order placement to ensure Liability Insurance is current.

### 3. Workers Compensation

NOTE: The State will not be responsible for any premium or assessments on the policy.

Contractor shall furnish to the State a certificate of insurance stating that there is Workers' Compensation insurance on all of its employees who will be engaged in the performance of this agreement.

The certificate of insurance must include the provision that the insurer will not cancel the insured's coverage without 30 days prior written notice to the State.

Ordering departments should request a copy of the proof of Workers Compensation Insurance at the time of order placement to ensure Workers Compensation Insurance is current.

### **L. FEDERAL DEBARMENT**

The Federal Department of Labor requires State departments that are expending Federal funds of \$25,000 or more to have a certification by the supplier that they have not been debarred or suspended from doing business with the Federal Government in the contract file. Each Contractor must provide this documentation upon request.

### **M. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE)**

This MSA does not include contractors certified as a DVBE; however departments should include DVBE program requirements (See the PAM) in their RFO process to ensure that they meet their overall DVBE incentive requirements.

### **N. TARGET AREA CONTRACT PREFERENCE ACT (TACPA), LOCAL AGENCY MILITARY BASE RECOVERY AREA (LAMBRA), AND ENTERPRISE ZONE ACT (EZA)**

These preference programs were not required or evaluated for this MSA; therefore should be included as part of the RFO process by the requesting agency.

### **O. SMALL BUSINESS(SB) PREFERENCE**

Fifty Eight (58) firms on this MSA are California certified small businesses and are designated in the contact information listed in Section V, Contractor Contacts. This preference was applied to each bid during the evaluation and selection process. The ordering department has SB utilization goals and must track dollars spent with a certified small business during the term of this MSA.

### **P. REPORTING REQUIREMENTS FOR ORDERING DEPARTMENTS**

1. Upon completion of the project, the ordering department shall complete the MSA Contract Performance Report in Section VI, FORMS. The completed form should be sent to the MAPS MSA Contract Administrator. Ordering departments may also use the Contract/Contractor Evaluation Form (STD. 4).

2. If the contractor's performance is unsatisfactory, the ordering department must send a copy of the completed Std. 4 to the DGS, Office of Legal Services within five (5) days after the completion of the evaluation. The contractor must be notified and sent a copy of the unsatisfactory Std. 4 evaluation by the ordering department within fifteen (15) days after its completion. See Section II Ordering Procedures H.22.
3. Effective January 1, 2001, departments must report specific information on independent sole proprietor contractors to the Employment Development Department (EDD) as required by Unemployment Insurance Code §1088.8. The information must be reported within twenty (20) days of entering into a contract for \$600 or more, or if there is no contract, within 20 days of when the payments total \$600 or more in any calendar year, whichever occurs sooner. For assistance in reporting to EDD, please call 916-657-0529, the EDD Tax Branch, Accounts Services Group.

**Q. LOCAL AGENCIES GUIDELINES FOR USE OF THIS MSA**

1. Local agencies must agree to all the terms and conditions of this MSA when issuing orders against this MSA.
2. Local agencies may use their own contract forms but must include all pertinent information as required by State ordering agencies—the data elements are described in Section VI, Forms, STD 213.
3. DGS charges the users of this MSA an administrative fee. The DGS administrative fee is a specified percentage set annually of contracted services. Local agencies using this MSA should check the DGS website for current rates. Refer to the DSG Price Book or <http://www.ofs.dgs.ca.gov/Price+Book/main.htm>. The DGS administrative fee is not included in the contractor's hourly rates for this MSA. Local agencies must agree to the State's administrative fee. The State will bill the local agency for using this MSA as outlined above.
4. The DVBE participation goals do not apply to MSA orders issued by local agencies.
5. The Small Business preference does not apply to MSA orders issued by local agencies. Local agencies are not required to track dollars spent through the use of certified small businesses.
6. Local Agency Reporting—send one copy of the approved order/contract form along with a copy of the Contractor and Evaluation and Selection Form to DGS/Procurement Division, Attn: Multiple Award Program Section (MAPS). The local agency resolution, if required, approving use of the MSA must be attached to the approval order/contract. The local agency order/contract document **must** include the DGS billing code. If a local agency has not been assigned a DGS billing code, call the DGS/PD at 916-375-4400.

## II. ORDERING PROCEDURES

These instructions are designed to help the ordering department with the final selection of a contractor. In addition to procedures listed in this user guide, the ordering department must follow established state and/or local agency policies and procedures when considering service needs.

### A. ORDER INITIATION GUIDELINES

1. Prior to initiating an order using this MSA, the ordering departments must follow and obtain all approvals for “the project”. All Procurement rules and regulations including State of California Management Memo(s), Governor’s Executive Order(s), etc. must be followed as part of using this MSA. Ordering departments (with the exception of local governments) must follow all Department of Finance (DOF) processes and procedures for IT as defined in the Statewide Information Management Manual (SIMM). Use of this MSA does not waive the DOF approval requirements.

A signed Certification of Compliance with state information technology policies is required for all IT procurements of \$100,000 or more and is in support of a development effort. Development is defined in SAM Section 4819.2 as “Activities or costs associated with the analysis, design, programming, staff training, data conversion, acquisition and implementation of new information technology activities.” Procurements of hardware, software and services (including interagency agreements) are included in this requirement.

A certification is not required for:

- Procurements less than \$100,000;
- Procurements limited only to maintenance services;
- Procurements in support of previously approved efforts. See SAM Section 4819.40;
- Procurement of services to conduct a feasibility study, provided the services are limited to supporting or conducting the feasibility study and/or preparing the feasibility study report (SAM Sections 4927 and 4928); or
- Procurements of/for excluded activities as described in SAM Section 4819.32.

The certification must be completed by the ordering department that will directly utilize the procured goods or services, and the original signed certification must be included with the transmittal or the procurement package to the procurement department or authority. The required format for the certification is provided in SAM Section 4832.

2. The ordering department must send either a copy of the appropriate “approval document” (i.e. Department of Finance, etc.) or reference the approved project # on the MSA order form when sending copies of an order to DGS/PD/Technology Acquisitions for reporting and billing purposes.
3. All departments using this MSA shall conform to the policies and procedures set forth in Management Memo 03-10 (or its most current revision), the State Contract Manual (SCM) and the Purchasing Authority Manual (PAM).

4. Ordering departments are responsible for following their own internal policies and guidelines for procurements when using this MSA.

## **B. ORDERS IN EXCESS OF \$500,000**

1. In order to exceed the \$500,000 limit on this MSA, the ordering department must submit a Request for Exemption to \$500,000 Limit on Master Agreements and an Information Technology Procurement Plan (ITPP) to DGS/PD Purchasing Authority Management Section (PAMS).

The Request for Exemption to \$500,000 Limit on Master Agreements document is located in PAM, Chapter 6, Section F & Section G. Requests must include how effective competition will be assured, the estimated dollar value of the project, how the needs of the state would be best served by not “formally” bidding the project to the entire open market of vendors, details regarding how the project will be managed and its timeline, and the qualifications of the staff who will run the competition for award.

The ITPP is a stand-alone document that provides the DGS/PD/TAS with information to assess a project’s readiness for procurement. Per the State Administrative Manual (SAM) Section §5200.6 an ITTP is required when a department exceeds the purchasing authority for acquisitions to be conducted against leverage procurement agreement. Use of the PD ITTP Template is required and can be located at: <http://www.documents.dgs.ca.gov/pd/policy/ITPP2003template.doc>.

After submission of the ITTP additional measures may be requested by the DGS.

2. Upon DGS approval to exceed \$500,000, your RFO document (located in PAM, Chapter 6, Topic 2) must be sent to all qualified contractors of the specific subcategory to allow all contractors the opportunity to respond to ensure competition.
3. After review and evaluation of offers, the ordering department should determine which contractor offered the best value and document the results.
4. Prior to contract award, the ordering department must submit the following to PAMS for concurrence with selection: (1) the final RFO including all Addenda, (2) all RFO responses submitted, (3) the proposed contract, and (4) the Final Evaluation and Selection Report. Upon concurrence, PAMS will provide a written concurrence letter and the ordering department may proceed with contract execution.
5. Variance of model contract terms is allowed only with DGS approval.

## **C. ORDERS LESS THAN \$500,000**

1. It is recommended that the ordering department solicit all contractors in the specific service subcategory to ensure sufficient offers are obtained; however, a minimum of three offers including one small business is required to ensure competition.
2. After review and evaluation of offers, the ordering department should determine which contractor offered the best value and award the contract. If less than three offers are received, documentation as to why three offers were not received must be included in the procurement file and must be submitted to DGS with the NCA if the contract is above \$250,000.
3. If only one source is known (competing offers cannot be obtained), the non-competitive bid contract process must be followed.
4. Variance of model contract terms is allowed only with DGS approval.

#### **D. GENERAL INFORMATION RELATED TO THE USE OF THIS MSA:**

1. To eliminate follow on contracts no person, firm, or subsidiary thereof who has been awarded a consulting services contract may submit an offer for, nor be awarded a contract for, the provision of services, procurement of goods or supplies, or any other related action which is required, suggested, or otherwise deemed appropriate in the end product of the consulting services contract.
2. The selected contractor shall not commence work until receipt of a signed contract.
3. Work performed at the department shall be during normal department work days and hours unless a different schedule is specifically requested by the ordering department. There shall be no increase in hourly rates for extended hours or days (e.g. off hours, overtime and holidays).
4. The selected contractor is contractually obligated to provide personnel to work on projects on a statewide basis and must be available to start the project work within two (2) weeks of contract award or mutually agreeable time of being accepted by the ordering department.
5. Contractor must be available for an interview within five (5) working days or a mutually agreeable time from the date of notification by the ordering department of the interview intention.
6. Failure by the contractor to comply with any of the requirements from this section is grounds for contract termination.

#### **E. GENERAL ORDERING INSTRUCTIONS**

1. Any state or local agency may place orders against this MSA. Local agencies must follow additional guidelines included in Section I.Q.
2. Each contractor sent an RFO will be requested to submit an offer as detailed in Section 2.F. to the ordering department by the time specified in the RFO.

3. If the requirements of the project change you must solicit all of the contractors who were sent an initial RFO with the revised requirements.
4. After review and evaluation of all responsive offers, the ordering department will select the contractor that offered the best value solution as defined in PCC §12100.7. The ordering department has received the contractor's entire offer, the ordering department will make an award to the contractor whose response to the RFO was selected. Award will be made using a Standard Agreement 213, refer to Section VI, Forms. The SOW should be attached to the 213. Copies of approved MSA orders shall be sent to the DGS, PD Multiple Awards Program Section (MAPS).
5. There shall only be one vendor per MSA order.
6. If an ordering department wishes to rehire a contractor, a new RFO and MSA order must be executed.
7. MSA orders can be placed and approved by the ordering department under the guidelines of this MSA; however, if an ordering department is found to be in violation of this MSA's ordering procedures, they may be subject to revocation of their purchasing authority to use this MSA.
8. Any amendment to an ordering department contract must comply with PAM Chapter 8, Topic 7.

## **F. CONTRACTOR'S RESPONSE TO RFO**

The responses submitted by contractors must include the following:

- a. Procedures/Methods to accomplish the ordering departments project in a SOW (i.e. solution to the described situation);
- b. Detailed task plan and budget plan including the number of hours, hourly rate (not to exceed the MSA rates), and total for each person named to be working on the project. If the project covers more than one service category/subcategory in which the contractor has different contracted hourly rates, the budget must list the number of hours that the contractor's personnel will work in each category/sub category. Resumes and classifications of contractor's staff and subcontractors assigned to work on the project. The contractor will submit sufficient documentation so the ordering department can be assured the contractor's personnel meet the experience requirements;
- c. All expenses such as training materials should be listed as separate line items in the budget as they relate to the SOW;
- d. Sales tax does not apply to services supplied under this MSA. Contact the State Board of Equalization toll free at 800-400-7115 for general tax questions and information;
- e. DVBE participation information, as required by ordering department;
- f. TACPA, LAMBRA, and EZA documents, if required by ordering department;
- g. Copy of current certification as a small business and DVBE if applicable;
- h. Proof of Professional Errors and Omissions Insurance, if required by ordering department;
- i. Performance bond, if required by ordering department.

## **G. FINAL SELECTION OF CONTRACTOR**

1. The ordering department should form a team to review the submitted responses based on “best value” to select the contractor. The criteria used for the selection must be quantifiable and each response must be evaluated on the same basis. Examples of selection criteria are experience, staffing, local proximity to work site and availability to complete the project within the requested timeframe, and total cost of project.
2. The selection process must include evaluation of written RFO and can include conference call interviews or face-to-face interviews as well as a review of the contractor’s written response to the RFO.
3. After the selection is made, simply notify the contractors of your selection.

## **H. FILE DOCUMENTATION**

Ordering departments must record their evaluation and selection criteria and keep the following pertinent documents in the procurement file:

1. Department internal expenditure and contract approval
2. GC §19130 justification (Section VI, Forms Example)
3. RFO with minimum of 3 responses. Including S/B or DVBE if applicable
4. Resumes
5. Certificate of PMP, if applicable
6. Financial Information/Bond, if applicable
7. Secretary of State Certification
8. Certificate of Liability Insurance greater than \$1,000,000 if federal funds are used
9. Federal Debarment certification signed by the contractor that they have not been suspended from doing business with the Federal Government
10. Workers Compensation Liability Insurance
11. Confidentially Statement signed by the contractor.
12. Payee Data Record STD 204 <http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf>
13. California S/B or DVBE certification, if applicable
14. The SOW must include service subcategory job classification and rates

15. Contractor's MSA contract including the rate schedule
16. SB/DVBE incentive documentation
17. Completed evaluation and selection report
18. Standard Agreement 213 along with an Agreement Summary 215
19. <http://www.ols.dgs.ca.gov/contracting+info/formsandinstructions.htm> including the SOW, Department Billing Code, Leverage Procurement Agreement number, Delegation number, and supporting documentation. Copies of all said documents must be sent to the Department of General Services, Procurement Division, Master Agreement Unit. A STD 65 is not permissible
20. State Contract Procurement Registration Systems (SCPRS) confirmation
21. Contract Award Report STD 16  
<http://www.documents.dgs.ca.gov/osp/pdf/std016.pdf>
22. Contract/Contractor Evaluation (STD4)  
<http://www.documents.dgs.ca.gov/osp/pdf/std004.pdf>  
Should occurrences of either outstanding performance or poor performance be encountered the DGS Procurement Division Contract Administrator should be notified. The contract shall have the option of reviewing any such submitted performance reports and evaluation.

### III. SERVICE CATEGORIES AND JOB CLASSIFICATIONS

Only the categories in which each bidder successfully bid is listed in the contract. Contractor personnel must be able to perform the following service subcategories and they must be performed by the staff classification and experience as explained below.

#### A. Primary Category I--Independent Project Oversight Activities

This category includes Project management, Oversight services and Independent Project Auditing. The activities that DOF requires to be performed include impartial oversight of large and/or complex IT projects. Independent Project Oversight Contractors (IPOC) may be contracted with to perform impartial oversight and review on large and/or complex projects as a condition of DOF project approval.

##### Subcategories:

**I.A - Independent Verification and Validation (IV&V)**—Provides oversight of deliverables such as program code, test scripts and results, and network configurations and processes used to create the products. Determines whether the products of each step in the development cycle will fulfill all the requirements and whether processes used to follow the intended life cycle methodology.

**I.B - Project Management** – Manages the structured components such as risk management, contract management, communications management and cost/time management of the project and/or provides project management support services consistent with current industry standards.

**I.C - Independent Project Oversight**— Audits system development, acquisition and maintenance controls to assure a structured project management methodology is adhered to and managed. Provides oversight of project management activities such as; project scheduling, risk management, change management, etc. Assesses project progress.

**I.D -- Quality Assurance** - The process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards.

#### B. Primary Category II – Project Development Activities

The services of this category will be used for IT projects where the ordering agency has identified a need for contractor support in the implementation of an IT project.

##### Subcategories:

**II.A - Programming** - Writing and maintaining the detailed instructions –referred to as “programs” or “software” that list in logical order the steps that computers must execute to perform their functions.

**II.B - System Analysis/Design/Implementation** – Assist with business process documentation, data modeling, system modeling, application system analysis, the creation of general and detail system design specifications, and the development and execution of a system.

**II.C - System Support** - Provide assistance and advice to users, interpreting problems and providing technical support for software and systems developed under this contract.

**II.D -Training** – Provide training curricula; conduct training sessions for customer agency's specific processes, and for systems developed under this contract. (NO application training i.e., Windows, etc.)

### **C. Primary Category III – Project Support Activities**

This Category is for use for project planning, procurement and documentation activities.

#### **Subcategories:**

**III.A - IT Planning** – Conduct market studies, research, and documentation of administrative requirements for information technology projects such as preparation of Feasibility Study Reports, solicitation documents, and Post Implementation Evaluation Reports (PIER). Conduct impact analysis plans, disaster recovery plans, and analysis of backup/recovery plans.

**III.B - IT Facilitation** – Lead and conduct meetings that bring together system users and technical professionals, lead JAD sessions, etc.

**III.C - Report Writing** – Write technical documents such as program specifications, system documentation, standards, procedure manuals, conversion of existing documents and user manuals.

### **D. Job Classifications and Staff Experience Requirements**

Each contractor will be responsible for providing qualified staff in each job classification for every service subcategory awarded.

#### **1. Senior Project Manager**

**Responsibility** A Senior Project Manager is at the full journey level and is responsible for the most complex projects. This classification manages both internal and external project teams and interacts with department heads, agency secretaries at the ordering agency, State control agencies, and individuals of similar status in the private sector. The Senior Project Manager has full responsibility for the projects tasks and deliverables associated with time, cost, quality assurance, human resources, communication, risk, procurement, and scope management.

**Experience** This classification must have a minimum of seven (7) years of broad and extensive project management experience. At least four (4) years of that experience must have been in a lead capacity.

**Education** This classification requires the possession of a bachelor's degree or equivalent university degree and a Project Management Professional (PMP) certification which will be verified with the bidder's response to the Request For Offer (RFO) released by the user agency.

## **2. Project Manager**

**Responsibility** A project manager is at the journey level and is usually working under the direction of a senior project manager and is responsible for projects interacting with mid-level officials of similar status at the ordering agency and private sector. This classification is responsible to establish and maintain cooperative working relationships; use interdisciplinary teams effectively in the conduct of the project; speak effectively before large groups; reason logically and creatively and use a variety of analytical research techniques to solve complex problems; analyze situations and propose an effective course of action; analyze data; provide quality assurance, identify the need for and provide creative thinking related to complex problems, develop and evaluate alternatives; write thorough, credible, well-documented reports; and work within tight deadlines associated with the project's time, cost, quality, human resources, communication, risk, procurement, and scope management.

**Experience** This classification must have a minimum of five (5) years of broad and extensive project experience. At least three (3) years of the experience must have been in a lead capacity.

**Education** This classification requires the possession of a bachelor's degree or equivalent university degree and a Project Management Professional (PMP) certification which will be verified with the bidder's response to the Request For Offer (RFO) released by the user agency.

## **3. Senior Technical Leader**

**Responsibility** A Senior Technical Leader is at the full journey level and acts in a lead capacity on complex projects routinely interacting with mid-level officials of similar status at the ordering agency/private sector. The incumbent must be able to lead technical personnel in a variety of projects including electronic information processing systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with data processing systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks. In addition, this classification must be able to analyze data and situations, identify and solve problems, reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Experience** This classification must have a minimum of seven (7) years of experience in projects. At least four (4) years of that experience must have been in a lead capacity.

**Education** This classification requires the possession of a bachelors or equivalent university degree or certificate in management information systems or computer science.

## **4. Technical Leader**

**Responsibility** A Technical Leader is at the journey level, performing progressively responsible analytical work in a variety of electronic information systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with data processing systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks.

**Experience** This classification must have a minimum of five (5) years' experience in similar projects. At least three (3) years of that experience must have been in a lead capacity. This classification must be able to analyze data and situations; identify and solve problems; reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Education** This classification requires the possession of a bachelors or equivalent university degree or certificate in management information systems or computer science.

## **5. Application Analyst—Business Oriented**

**Responsibility** An Application Analyst designs system requirements based upon business requirements; is at the full journey level working under general supervision of a technical Leader or project Manager; performs a variety of tasks in connection with the analysis, development, installation, implementation, procurement, or support of electronic information processing systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems; and/or participates with other analysts on electronic information processing systems studies of complex nature or broad scope. This classification must be able to analyze data and situations, identify and solve problems, reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Experience** This classification must have a minimum of five (5) years' experience in working on data processing related projects. At least three (3) year of that experience must have been in application development or maintenance of data processing systems.

**Education** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelors or equivalent university degree in management information systems or computer science.

## **6. Systems Analyst**

**Responsibility** A Systems Analyst develops systems requirements into system design specifications; is the full journey level working under general supervision of a Technical Leader or Project Manager performing a variety of tasks in connection with the analysis, development, installation, implementation, procurement, or support of electronic information processing systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems; and/or participates with other

analysts on electronic information processing systems studies of complex nature or broad scope including independent verification and validation. This classification must be able to analyze data and situations, identify and solve problems, reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Experience** This classification must have a minimum of five (5) years' experience in working on data processing related projects. At least three (3) year of that experience must have been in systems analysis and design.

**Education** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelors or equivalent university degree in management information systems or computer science.

## 7. Senior Programmer

**Responsibility** A Senior Programmer acts in a lead capacity on the most complex applications, and/or on the most complex data processing problems and can work independently as a high level technical specialist. This classification must have knowledge of electronic computer programming; electronic data processing equipment and its capabilities; principles and techniques of studying work processes for new or revised electronic computer applications; principles of designing methods of processing data; technical report writing; independent verification and validation and statistical methods. This classification must also have the ability to write complex programs and develop detailed program specifications; analyze data and situations, reason logically and creatively, identify problems, draw valid conclusions, and develop effective solutions; apply creative thinking in the design and development of methods of processing data with electronic computers; establish and maintain cooperative working relationships with those contacted in the course of the work; speak and write effectively and prepare effective reports.

**Experience** This classification must have a minimum of seven (7) years experience in electronic data processing systems study, design, and programming, at least four (4) years of which shall have included responsibility on a project basis for analyzing operational methods and developing computer programs to meet desired results.

**Education** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelors or equivalent university degree in management information systems or computer science.

## 8. Programmer

**Responsibility** A Programmer acts under general supervision, and can act in a lead capacity on complex applications, and/or on complex data processing problems and can work independently as a technical specialist. This classification must have knowledge of

electronic computer programming; electronic data processing equipment and its capabilities; principles and techniques of studying work processes for new or revised electronic computer applications; principles of designing methods of processing data; technical report writing; independent verification and validation and statistical methods. This classification must have the ability to write complex programs and develop detailed program specifications; analyze data and situations, reason logically and creatively, identify problems, draw valid conclusions, and develop effective solutions; apply creative thinking in the design and development of methods of processing data with electronic computers; establish and maintain cooperative working relationships with those contacted in the course of the work; speak and write effectively and prepare effective reports.

**Experience** This classification must have a minimum of five (5) years experience in electronic data processing systems study, design, and programming, at least three (3) years of which shall have included responsibility on a project basis for analyzing operational methods and developing computer programs to meet desired results.

**Education** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelors or equivalent university degree in management information systems or computer science.

## **9. Instructor**

**Responsibility** An Instructor is responsible for developing, presenting, and training agency staff on applications developed under this contract. The Instructor will be responsible for managing tasks related to consulting, planning, programming, organizing, scheduling, and conducting training on IT systems. The Instructor will provide consultation, manuscripts, and present instruction, coordinate the construction or preparations of training aids using good judgment and discretion in the form, content, and method of presenting the subject material. Instructor shall also select and manage technical training assistants, and organize facilities to support the training effort; develop and maintain a master calendar of events; be able to communicate effectively with technical and non-technical staff.

**Experience** This classification requires four (4) years experience in providing IT instruction and proficient in training principles and methods.

**Education** This classification requires the possession of a bachelors or equivalent university degree in management information systems, computer science, business or communications.