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State of California—Health and Human Services Agency
California Department of Public Health



EDMUND G. BROWN JR.
Governor

July 29, 2014

Request for Offer

ADDENDUM 1

RFO #2014-01 - REVISED

For: Information Technology (IT) Consultant Services for eWIC Management Information System Acquisition Specialist and Subject Matter Expertise Services for the Women, Infants and Children (WIC) Program

You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these goods and/or services, you must comply with the instructions contained in this document as well as the requirements stated in the State's Scope of Work (SOW), Attachment 1, and Cost Worksheet, Attachment 5. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO and your proposed California Multiple Award Schedule (CMAS) contract.

Read the attached document carefully. The RFO due date is: **August 25, 2014 10:00 a.m.** Responses to this RFO and any required copies must be submitted by mail or hand delivery, clearly labeled to the department contact noted below.

Department Contact:

California Department of Public Health
Women, Infants and Children (WIC) Program
Trina Martinez
3901 Lennane Drive
Sacramento, CA 95834

Phone: (916) 928-8763 Fax: (916) 263-3358

Email address: Trina.Martinez@cdph.ca.gov

SECTION ONE

1. General Information

1.1 Purpose

The purpose of this Request for Offer (RFO) is to procure Acquisition Specialist and Subject Matter Expertise (SME) consultant services for the eWIC Management Information System (eWIC MIS) project. The goal of the project is to transfer and implement an MIS system for the State of California Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Program. The MIS system will be integrated with an online, out-sourced Electronic Benefit Transfer (EBT) system. The Acquisition Specialist consultant(s) and SME Consultant will facilitate development and approval of the required Request for Proposal (RFP) and prepare portions of the RFP under the oversight of State staff. The objective of the RFP is to establish a contract with a vendor for Design, Development and Implementation (DD&I) services to transfer, configure and implement an authorized MIS system for the California WIC Program. The MIS transfer system will replace the existing mainframe based WIC MIS system.

The specific tasks and deliverables associated with this RFO are included in the Scope of Work (SOW), Attachment 1. The Acquisition Specialist and SME consultants must have extensive knowledge and experience with RFP development and major IT procurements. The consultant team must also provide subject matter expertise related to WIC programs, USDA requirements, WIC MIS transfer systems and WIC EBT systems and services.

1.2 Background

WIC is a Federal nutrition program that helps pregnant women, new mothers, and young children eat well, learn about nutrition and stay healthy. In California, the WIC Program operates within the California Department of Public Health (CDPH) which is located within the California Health and Human Services Agency (HHSA). CDPH is the state's lead department for public health policy and advocacy. CDPH's Center for Family Health (CFH) administers the California WIC Program.

WIC's goal is to improve health by informing families about good health practices and by providing nutritious foods to eligible Californians. WIC is designed to serve income-eligible applicants who are nutritionally or medically at risk. The WIC Program is funded by the United States Department of Agriculture (USDA) and governed by Federal Regulations contained in the Federal Register 7 CFR Part 246.

The implementation of a USDA approved MIS system in California's technical environment and integration with an online, out-sourced hosted EBT system will allow the California WIC Program to support the CDPH's long tradition of public health service by improving services to participants and maintaining financial and operational integrity of the WIC Program. The implementation of these systems also allows the California WIC Program to meet the USDA Food and Nutrition Service (FNS) requirement for implementation of WIC EBT by October 1, 2020.

CDPH conducted analyses required by USDA FNS Handbook 901 to obtain approval to transfer and implement a WIC MIS in California. California WIC has elected to transfer, modify and implement a USDA approved, operational MIS system compliant with the USDA's WIC Universal MIS-EBT Interface (WUMEI) standard. California WIC seeks to adopt a State Agency Model (SAM) transfer system or non-SAM system which meets the USDA functional requirements and is modifiable to meet identified California requirements while also being capable of resolving California WIC's capacity needs. CDPH intends to establish a contract with a qualified vendor to transfer, modify, implement and support one of the USDA approved MIS systems for the WIC Program in California.

The scope of eWIC MIS deployment includes the state level WIC headquarters office and eighty-four (84) local agencies, composed of approximately 650 service sites, around the state. System hosting of the MIS transfer system will be performed within a managed environment at the California Data Center near Sacramento, California. The new eWIC MIS system will replace the existing Integrated Statewide Information

System (ISIS) currently used for WIC MIS in California. The eWIC MIS project will collaborate with California’s EBT processor to concurrently implement the California WIC MIS transfer system and online EBT in the California environment in compliance with USDA and industry standards.

The estimated date for the release of the RFP for the DD&I services procurement is April 2015. The Statewide Technology Procurement Division (STPD) will be the procurement official for the MIS procurement.

1.3 Major Tasks

Major tasks for the RFO are detailed in the Scope of Work, Attachment 1.

- A. Facilitate development of the RFP for the eWIC MIS DD&I contractor including a plan for strategy, evaluation and selection
- B. Prepare an Implementation Advanced Planning Document (IAPD) Update for submission to the USDA
- C. Status reporting.

1.4 Key Action Dates

It must be understood that time is always of the essence, both for the RFO submittal and Purchase Order completion. Respondents are advised of the key dates and times shown below. Offers not received by the due dates will be deemed nonresponsive and will not be considered.

	Event	Date	Time
1.	Release of RFO	July 2, 2014	----
2.	Deadline for Submission of Written Questions	July 8, 2014	10:00 a.m. PDT
3.	Response to Written Questions	August 1, 2014	----
4.	Due Date for RFO Response	August 25, 2014	10:00 a.m. PDT
5.	Mandatory Interviews	TBD	TBD
6.	Anticipated Award	September 23, 2014	3:00 p.m. PDT
7.	Consultant Staff Begin (after contract is signed)	September 29, 2014	----

1.5 Questions Relating to this RFO

All offerors are encouraged to carefully review all pages of this RFO. All questions, comments and concerns about this RFO or clarification regarding the services sought must be submitted electronically to Trina Martinez at Trina.Martinez@cdph.ca.gov by the due date. All answers to any questions will be emailed to all offerors.

Offerors that fail to report a known or suspected problem with this RFO or fail to seek clarification and/or correction of this RFO shall submit an offer at their own risk. In addition, if awarded the Purchase Order, the successful offeror shall not be entitled to additional compensation for any additional work caused by such problem, including any ambiguity, conflict, discrepancy, omission, or error.

If an inquiry appears to be unique to a single firm or is marked “Confidential,” the State will respond only to the inquirer if the State concurs with the offeror’s claim that the inquiry is sensitive or proprietary in nature. If the State does not concur, the inquiry will be answered in the manner described herein and the offeror will be so notified. The State reserves the right to contact an inquirer to seek clarification of any question or inquiry received.

1.5.1. What to Include in a Question or Inquiry

- A. Inquirer's name, name of firm submitting the question or inquiry, mailing address, email address, area code and telephone number, and fax number
- B. A description of the subject or issue in question or discrepancy found
- C. RFO number and section, page number or other information useful in identifying the specific problem or issue in question
- D. Remedy sought, if any.

1.5.2. Question Deadline

Submit questions and inquiries no later than the date and time stated in Section One, Item 1.4. Key Action Dates.

1.6 Cost

The estimated amount for tasks, not including unanticipated hours for scope of work tasks, allotted for the Consultant Services for eWIC MIS Acquisition Specialist and SME Services for the WIC Program is \$250,000. Offers received for tasks (not including unanticipated hours) shall not be greater than \$250,000 for this project; any offers exceeding this amount will be rejected. Unanticipated hours as a result of unanticipated costs shall not exceed a cost of \$25,000.

1.7 Purchase Order

The Purchase Order will be for a maximum period of two years, subject to the availability of federal funding. This RFO document, the offeror's response to this document, and the CMAS contract, by reference, will be made part of the ordering department's Standard 65 Purchasing Authority Purchase Order and procurement contract file. The awarded Agreement will incorporate all provisions of the CMAS contract.

No performance of service may commence prior to the execution of the Purchase Order.

1.8 Amendment of Purchase Order

The purchase order may be amended for changes in quantity or time due to delays and unanticipated tasks that were evaluated and considered during the RFO review and selection process. All amendments must be approved by CDPH prior to implementing any change.

CDPH reserves the right to extend the term of the resulting agreement for up to one year to complete or continue services. Contract extensions are subject to satisfactory performance and possible approval by DGS.

Agreement will be in no force or effect until it is signed by both parties and approved by DGS, if required. The offeror is hereby advised not to commence performance until all approvals have been obtained. If performance commences before all approvals are obtained, said services may be considered voluntary.

1.9 Availability

The contractor must be able to meet the requirements of this RFO and be ready to begin work within five (5) business days of the start date of the Purchase Order.

1.10 Contractor Staff Location

The acquisition specialist and RFP development services shall be performed at WIC headquarters located at 3901 Lennane Drive, Sacramento, CA 95834 and at CDPH headquarters in the East End Complex located in downtown Sacramento. The acquisition specialist consultant(s) may be required to attend meetings with STPD representatives at their offices in Rancho Cordova, CA.

CDPH understands the SME consultant will most likely reside out of state. The SME's work tasks on the project may be done remotely and CDPH communications with the SME may take place using conference calls or webinars. The SME must be accessible by phone within eight (8) hours to answer subject matter questions unless otherwise agreed to by the State. If the offeror is selected for an interview, the SME will be required to attend the interview in Sacramento in person unless otherwise agreed to by the State. If the offeror is awarded this contract, the SME will be required to attend the kick-off meeting in Sacramento in person. The SME will also be expected to be physically present at WIC Headquarters for five days (either one full work week or five days spread out over a few weeks) to participate in work groups that will review, refine, prioritize and finalize the list of functional business requirements that were attached to the IAPD and will be included with the RFP.

The State will provide office space, chairs, telephones, and workstations with all software and connectivity deemed necessary by the State for these Contractor personnel. In addition, the State will provide the Contractor access to necessary general office equipment, such as fax machines, copiers, and printers. If the Contractor desires other items, the Contractor must supply such items, subject to approval by the State Contract Manager.

1.11 Contractor Staff Work Hours

The services shall be provided during working hours of 8:00 a.m. to 5:00 p.m., Monday through Friday, except official State holidays.

1.12 Follow-on Contracts are Prohibited

Per Public Contract Code 10365.5, no person, firm or subsidiary thereof who has been awarded a purchase order for consulting services may be awarded a purchase order for the provision of services which is required, suggested, or otherwise deemed appropriate as an end product of the purchase order. Therefore, any consultant who participates in development of the MIS RFP and related documents is precluded from providing any work as a prime contractor or sub-contractor under the contract that results from the MIS RFP.

SECTION TWO

2. RFO Response Guidelines

To submit a response to this RFO, you must comply with the instructions contained in this section. By submitting a response, your firm agrees to the terms and conditions stated in this RFO and the Department of General Services' California Multiple Award Schedule (CMAS) contract.

2.1. Offeror's Response Submission Requirements

Responses to this RFO must contain all information requested and must conform to the format described in this section. It is the offeror's responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the offeror's ability to perform the tasks and activities defined in Attachment 1, entitled Scope of Work.

The offeror must submit one (1) original response, three (3) required copies, and include a copy of the current California Multiple Award Schedule (CMAS) contract to the contact name and address

contained on the cover sheet to this RFO. The offeror must also submit one (1) electronic copy on a disk in pdf format.

The response and copies can be sent overnight express, U.S. mail or hand delivered, and must be received by the date specified in Section One, Item 1.4. Key Action Dates.

2.2. RFO Response Content

The response shall be organized into sections in the order described below and according to the Review Criteria found in Section Three, Item 3.2. The following sections and respective documents must be submitted in the offeror's response:

2.2.1. Section A - Cover Sheet – Attachment 2

The offeror must complete Attachment 2, Cover Sheet included in this RFO.

A. Subcontractor Information - If the offeror intends to solicit the services or resources of a subcontractor to fulfill any of the requirements, provisions, terms and conditions specified in the RFO, then the offeror shall append a statement to the cover sheet for each subcontractor stating:

1. The firm name, address and contact person;
2. The SOW to be performed by the subcontractor;
3. The reason for soliciting a subcontractor's participation in the RFO;
4. The subcontractor's qualifications to fulfill the tasks in the SOW.

Subcontractors are subject to all of the terms, conditions and requirements of the subsequent Purchase Order.

B. Scope of Work Narrative - The offeror must append a narrative to the cover sheet describing how they meet the Mandatory Requirements in Section Three, Item 3.2.2 and Desirable Qualifications in Section Three, Item 3.2.3., and will perform the work necessary to accomplish the tasks described in Attachment 1, entitled Scope of Work. This narrative should include the strengths the offeror possesses and the benefits of choosing the offeror for this project. The narrative is not to exceed two (2) pages.

2.2.2. Section B – Mandatory Requirements Form – Attachment 3

A. The offeror must complete Attachment 3 - Mandatory Requirements. Offerors may propose up to two (2) consultants to perform the work tasks described herein; one consultant should be designated as the SME and the other consultant(s) will focus on the other tasks described in the SOW in Attachment 1. Failure to meet any mandatory requirement will result in offeror's response being disqualified from further evaluation.

2.2.3. Section C – Desirable Qualifications Form – Attachment 4

A. The offeror must complete Attachment 4 – Desirable Qualifications. Each proposed staff person must complete the desirable qualifications form.

2.2.4. Section D - Cost Worksheet – Attachment 5

- A. The offeror must complete Attachment 5 - Cost Worksheet that identifies the classification, hourly rate, estimated hours and total cost to complete the Scope of Work tasks. The classification must correspond to the classifications appearing in DGS's CMAS Agreement. The rates for any subcontractors cannot exceed those allowed in the CMAS Agreement.
- B. The CDPH has allocated 190 unanticipated hours for Scope of Work tasks. Attachment 5 Cost Worksheet #2, Unanticipated Hours for Scope of Work Tasks must be completed to identify the classification, hourly rate, and total cost estimate for the tasks described in the Scope of Work.

2.2.5. Section E - Customer References – Attachments 6 – 8A

- A. The offeror and subcontractor must submit a minimum of three (3) customer references on the following forms to validate experience providing Subject Matter Expertise and Acquisition Specialist services for the IT projects.
 - 1. Attachment 6, Customer Reference List (3 references for Offeror)
 - 2. Attachment 6A, Customer Reference List (3 references for each Acquisition Specialist)
 - 3. Attachment 6B, Customer Reference List (3 references for SME Consultant)
- B. The offeror and subcontractor must submit the following forms for each reference they have listed on Attachments 6 and 6A:
 - 1. Attachment 7, Customer Experience Reference Forms (Offeror)
 - 2. Attachment 7A, Customer Experience Reference Forms (for each Acquisition Specialist)
 - 3. Attachment 7B, Customer Experience Reference Forms (SME Consultant)

The descriptions of the projects must be detailed and comprehensive enough to permit the State to assess the similarity of those projects to the work anticipated in the award of the Purchase Order resulting from this procurement.

- C. The offeror and subcontractor must submit the following forms identifying nine (9) or twelve (12), depending if there are one or two Acquisition Specialists in the offer, references:
 - 1. Attachment 8, Reference Rating Forms (Offeror)
 - 2. Attachment 8A, Reference Rating Forms (for each Acquisition Specialist)
 - 3. Attachment 8B, Reference Rating Forms (SME Consultant)

These references must be selected from the references listed on Attachment 6, 6A and 6B. Attachment 7, 7A and 7B may be faxed or sent electronically to the customer reference for them to complete and return to the offeror. **Only three (3) completed Attachment 8, 8A and 8B Reference Rating Forms are to be included in the offeror's response package (total of 9 forms).** The Reference Rating Forms received will be used in the point scoring evaluation of the offeror's response package.

- D. The State may contact any of the customers named on the Attachments 6, 6A, 6B, 7, 7A, 7B, 8, 8A and 8B to validate the information provided by the offeror and to determine the customer's overall satisfaction with the services provided. Therefore, it may prove beneficial to the offeror and proposed consultant(s) to contact referenced customers to ensure their contact information provided on the Customer Experience Reference Form is up-to-date.

2.2.6. Section F – Response to Miscellaneous Forms – Attachments 9 – 11

- A. Attachment 9 - Confidentiality Statement, the offeror must sign, date and submit
- B. Attachment 10 – Conflict of Interest and Confidentiality Certification, all staff must fill out and sign.
- C. Attachment 11 – FNS Required Federal Provision, no response needed.

SECTION THREE

3. RFO Review of Offers

3.1. Review Process

Each response to this RFO will be reviewed for responsiveness to the requirements stated in the RFO. Responses will only be evaluated based on the information provided. Offeror's should ensure that all relevant information is fully and completely provided for the review. If a response is missing required information, it may be deemed not responsive. Further review is subject to the State's discretion.

3.2. Review Criteria

The review criterion consists of six (6) parts: Administrative Requirements, Mandatory Requirements, Desirable Qualifications, References, Cost, and Interview.

3.2.1. Administrative Requirements Criteria (Pass/Fail)

The administrative items listed in the table below are required. Failure to complete, sign, and submit any of these items will result in the offeror's response being disqualified from further review.

Administrative Requirements	Yes	No
Attachment 2 – Cover Sheet and: A. Subcontractor Information (if applicable) B. Scope of Work Narrative		
Attachment 3 – Mandatory Requirements (Acquisition Specialist)		
Attachment 3 – Mandatory Requirements (Subject Matter Expertise)		
Attachment 4 – Desirable Qualifications (Acquisition Specialist)		
Attachment 4 – Desirable Qualifications (Subject Matter Expertise)		
Attachment 5 – Cost Worksheet		
Attachment 6 – Customer Reference List (Offeror)		
Attachment 6A – Customer Reference List (Acquisition Specialist)		
Attachment 6B – Customer Reference List (SME Consultant)		
Attachment 7 – Customer Experience Reference Form (Offeror)		
Attachment 7A – Customer Experience Reference Form (Acquisition Specialist)		
Attachment 7B – Customer Experience Reference Form (SME Consultant)		
Attachment 8 – Reference Rating Form (Offeror)		
Attachment 8A – Reference Rating Form (Acquisition Specialist)		
Attachment 8B – Reference Rating Form (SME Consultant)		
Attachment 9 – Confidentiality Statement		
Attachment 10 – Conflict of Interest and Confidentiality Certification (State of California Department of Technology)		

3.2.2. Mandatory Requirements (Pass/Fail)

Offerors may propose up to (3) three consultants to perform the work tasks described herein. Of the consultant(s) offered, one must be designated as the individual possessing the SME knowledge and experience related to WIC, USDA, MIS and EBT. The remaining consultant(s) offered must be designated as the individuals that will satisfy the acquisition specialist qualifications and prepare the IAPD Update.

Each acquisition specialist consultant offered by the offeror must satisfy the mandatory qualifications identified below. The following mandatory experience qualifications may overlap with each other but not with the desirable qualifications.

- A. Minimum of three (3) years of experience performing RFP development and acquisition specialist services.
- B. At least one engagement of at least six (6) months in length that involved procurement for an enterprise-wide effort with multiple stakeholders for an organization of at least the size and complexity of California WIC.
- C. At least six (6) months of experience preparing and writing bid solicitation documents such as RFPs for a governmental entity.
- D. Provide a complete resumé of the relevant experience for each proposed acquisition specialist staff person to support the contractor's ability to perform the activities and produce the documents identified in the Scope of Work, Attachment 1. Resumé entries should clearly demonstrate that the experience requirements described in the Mandatory Requirements, Attachment 3 of this RFO, are also met.

The SME Consultant offered by the offeror must, satisfy all mandatory qualifications identified below.

- A. Minimum five (5) years of experience working with state level WIC Programs in a staff, consulting and/or management capacity.
- B. Minimum three (3) years of experience working with state-level WIC MIS transfer systems authorized by the USDA. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC MIS transfer systems at the state level
- C. Minimum three (3) years of experience working with state-level WIC EBT systems integrated with EBT-ready MIS transfer systems. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC EBT systems at the state level.
- D. Provide a complete resumé of the relevant experience for the proposed SME staff person to support the contractor's ability to perform the activities and produce the deliverables identified in the Scope of Work, Attachment 1. Resumé entries should clearly demonstrate that the experience requirements described in the Mandatory Requirements, Attachment 3 of this RFO are also met.

3.2.3. Desirable Qualifications (50 points)

Additional desirable qualifications include the following. Desirable qualifications must not overlap with the mandatory qualifications shown above.

In addition to the Mandatory Requirements, the Acquisition Specialist(s) may also have the following Desirable Qualifications:

- A. Additional years of experience providing RFP development and acquisition specialist services to California state agencies and departments. (1 point per year up to a maximum of 10 points)
- B. Additional years of experience providing RFP development and acquisition specialist services to governmental entities other than California state agencies and departments. (1 point per year up to a maximum of 5 points)
- C. Years of experience performing RFP development and acquisition specialist services for the procurement of a system integrator to configure and implement an off-the-shelf system for a government entity. (1 point per year up to a maximum of 5 points)

In addition to the Mandatory Requirements, the SME may also have the following Desirable Qualifications:

- A. Additional years of experience working with state level WIC Programs in a staff, consulting and/or management capacity. (1 point per year up to a maximum of 10 points)
- B. Additional years of experience working with state-level WIC MIS transfer systems authorized by the USDA. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC MIS transfer systems at the state level. (1 point per year up to a maximum of 10 points)
- C. Additional years of experience working with state-level WIC EBT systems integrated with EBT-ready MIS transfer systems. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC EBT systems at the state level. (1 point per year up to a maximum of 10 points)

3.2.4. References (40 points)

- A. Three (3) Reference Rating Forms (Attachment 8) must be submitted for the offeror, three (3) Reference Rating Forms (Attachment 8A) for each Acquisition Specialist and three (3) Reference Rating Forms (Attachment 7A) for the SME Consultant (a total of nine (9) twelve (12) Reference Rating Forms required, depending if there are one or two Acquisition Specialists in the offer). Reference Rating Forms will be evaluated and points given based on the points described on the forms.

3.2.5. Cost (60 points)

The offeror's costs shall be no greater than the rates stated in its CMAS, and shall include labor, materials, supplies, travel costs, applicable taxes, and any other cost incurred to provide the services described in Attachment 1, entitled Scope of Work.

The RFO evaluation of cost will be scored on the TOTAL COST of the offer that includes the unanticipated hours (Attachment 5 - Cost Worksheet, Grand Total Scope of Work and Unanticipated Hours).

3.2.6. Interview (50 points)

Once the evaluation has been completed, the two (2) offerors with the highest number of points will be selected for interviews. The project team identified by the offeror must be available to attend the face-to-face interview. The interview will take place in Sacramento, California, at a date and time to be determined. The interview will consist of detailed questions designed to verify the qualifications, experience, and capabilities of the proposed project team.

3.3. “Best Value” Methodology - Evaluation Process

Award of a Purchase Order resulting from this RFO will be based on a best value method that includes cost as a substantial factor in the selection process. As a result, the selected contractor's overall approach and cost provides the best value.

Review Criteria	Percentage	Points
Desirable Qualifications	25%	50 pts
References	20%	40 pts
Cost	30%	60 pts
Interview	25%	50 pts
TOTAL	100%	200 pts

The table below displays an example of three responses evaluated using “Best Value” methodology. In this example, Offer #2 is eliminated from the interview process because they have the lowest combined score and the award goes to Offer #3, the offeror with the highest “Grand Total” points.

Review Criteria	Offer #1	Offer #2	Offer #3
Desirable Qualifications Score	32 pts	46 pts	42 pts
Reference Rating Score	40 pts	36 pts	38 pts
Total Points	72 pts	82 pts	80 pts
Cost Submitted	\$113,000	\$160,000	\$150,000
Cost Calculation	$\$113,000 / \$113,000 = 1$	$\$113,000 / \$160,000 = .71$	$\$113,000 / \$150,000 = .75$
Cost Points	$1 \times 60 = 60 \text{ pts}$	$.71 \times 60 = 42.6 \text{ pts}$	$.75 \times 60 = 45 \text{ pts}$
Total Points	60 pts	42.6 pts	45 pts
Points Subtotal	32 + 40 + 60 = 132 pts	46 + 36 + 42.6 = 124.6 pts.	42 + 38 + 45 = 125 pts.
Interview - Total Points	35 pts	0 pts	46 pts
Above Criterion + Interview GRAND TOTAL	132 + 35 = 167 pts	124.6 pts.	125 + 46 = 171 pts

Attachment 1 Scope of Work

1. Service Overview

Contractor agrees to provide to the California Department of Public Health (CDPH), Women, Infants and Children (WIC) Program the services described herein.

The Acquisition Specialist consultant(s) and Subject Matter Expertise (SME) Consultant will facilitate development and approval of the required Request for Proposals (RFP) and prepare portions of the RFP to establish a contract with a vendor for Design, Development, and Implementation (DD&I) services to transfer, configure and implement an authorized MIS system for the California WIC Program. The consultant(s) will also update the current Implementation Advance Planning document for submission to the United States Department of Agriculture (USDA) and provide status reports to the Project Management Team and Steering Committee.

2. Services to be Performed

A. Facilitate development and approval of the RFP for the eWIC MIS Design, Development and Implementation (DD&I) contractor

The consultant(s) shall work with CDPH, USDA, and Statewide Technology Procurement Division (STPD) staff throughout the RFP development process and until the RFP is approved and released by the STPD. The consultant(s) will make recommendations and carry out decisions made by STPD and CDPH. After release of the RFP, the consultant(s) will play a limited role in the procurement process.

The consultant(s) will perform the services and tasks identified below.

1. Work Plan for development of the eWIC MIS DD&I RFP – Due: One (1) month from contract start date or earlier

The consultant(s) will prepare a plan that covers the development and release of the RFP. This plan will identify the staff resources needed for each step and how much of their time will be required. The work plan will be developed using MS Project 2010 and identify all work and resources required to complete the RFP.

2. Strategy and Plan for the eWIC MIS DD&I Procurement – Due: Two (2) months from contract start date or earlier

The STPD staff will facilitate the process of developing the strategy and plan for the MIS procurement and make recommendations and decisions. The consultant(s) will document STPD's recommendations and decisions, document the resulting plan and strategy, prepare RFP content accordingly, and help CDPH execute the plan and strategy. The consultant(s) will recommend procurement "best practices" that STPD and CDPH may consider. The consultant(s) will prepare a detailed plan for the procurement process including activities related to vendor conferences, confidential discussions, RFP amendments, proposal evaluation and scoring, bid opening, notice of contract award, contract approvals, and contract award. This plan will identify the resources such as subject matter experts and procurement staff needed for each step and how much of their time will be required.

3. Evaluation and Selection Plan – Due: Four (4) months from contract start date or earlier

Based on direction from STPD and CDPH staff, the consultant(s) will develop the Evaluation and Selection Plan for the MIS procurement. This plan will identify and describe:

- a. The processes and steps that will be used to evaluate, score and select a DD&I contractor.
- b. Who will be responsible for the various steps in the process and what their role will be, e.g. who will be involved in evaluating and scoring the proposals and who will need to approve the selection of a vendor.

- c. The tools and worksheets that will be used in the process.
- d. The proposal evaluation and contractor selection criteria.

STPD will facilitate and approve the final evaluation methodology. The consultant(s) will develop evaluation documents based on STPD and CDPH input.

4. Facilitate management and resolution of issues and risks – Due: Continuous throughout contract

The consultant(s) will identify, log and track issues and risks related to the procurement of the DD&I contractor for the MIS project. The consultant will analyze procurement issues and risks and make recommendations for their resolution. STPD will make decisions on procurement related issues and CDPH will make decisions on program related issues. The consultant will also keep track of decisions made by CDPH regarding the procurement of the DD&I contractor.

5. Prepare RFP content – Due: Six (6) months from contract start date or earlier

In conjunction with CDPH and the STPD, the consultant(s) will prepare all or portions of the various sections of the RFP for MIS including, but not limited to, current system, proposed system, rules governing competition, administrative requirements, technical requirements, cost, evaluation and scoring, warranties, maintenance and support, change requests, and terms and conditions. The developed RFP will need to include the State's Model contract language. The consultant(s) will leverage existing material in the MIS IAPD regarding the current and proposed systems. Where applicable, the consultant(s) will leverage RFP material used in other states to acquire MIS systems for WIC Programs. The consultant(s) will review, make recommendations and enhance the draft Statement of Work (SOW) that CDPH has prepared for the MIS DD&I RFP. The consultant(s) will review the extensive list of business and technical requirements prepared during the planning phase and work with CDPH staff to tailor them into a set of requirements appropriate for inclusion in the RFP. The consultant(s) will gather and prepare the instructions and content regarding the technical architecture requirements and design for the MIS system from technical staff in CDPH and the State Data Center. The consultant(s) will develop instructions that describe the required format and content that MIS DD&I proposals must follow and the elements they shall contain including details of proposed costs. The consultant(s) will assemble draft and final versions of the eWIC MIS RFP that conforms to State regulations, State procurement guidelines and acquisition "best practices".

6. Facilitate review and approval of eWIC MIS RFP – Due: Nine (9) months from contract start date or earlier

In conjunction with CDPH, the consultant(s) will consult with the USDA and the STPD during their review of the draft RFP including preparation of responses to their questions. The consultant(s) will assist in securing approval from CDPH, USDA and the STPD for the RFP. The consultant(s) will modify, update or enhance the RFP to resolve any issues and questions from these entities.

7. Prepare procurement training materials – Due: Six (6) months from contract start date or earlier

The consultant(s) will assist CDPH and the STPD with the development of training materials and a presentation for the eWIC MIS DD&I evaluation and selection committee to explain the procurement process, the RFP and the evaluation and selection process.

8. Prepare bid documents and RFP library – Due: Six (6) months from contract start date or earlier

The consultant(s) will work with CDPH and STPD staff to prepare final RFP and bid documents for release and assemble the bid reference library. The bid library will contain relevant documents and material that will be needed by potential bidders to prepare their proposals and respond to the RFP. If CDPH determines that information from local agencies will need to be collected and provided in the bid library, the consultant(s) will prepare a survey to collect this information from local agencies. CDPH staff will distribute the survey to local agencies. The consultant(s) will compile the results into a document that will be included in the bid library.

9. Amend procurement documentation – Due: Nine (9) months from contract start date or earlier

If and when directed by CDPH, the consultant(s) will draft RFP amendments during the solicitation process as needed. The consultant(s) will prepare amendments or addenda with major modifications or additions to the RFP for distribution to interested bidders.

10. Provide Subject Matter Expertise (SME) – Due: Throughout the contract as needed

The SME Consultant will provide expertise, advice and input regarding the WIC program, USDA requirements, WIC MIS transfer systems, MIS system contractors, WIC EBT systems and local agency WIC operations as may be needed to support the development and approval of the eWIC MIS RFP and the acquisition of MIS transfer system services. The SME Consultant will focus on working with CDPH to finalize the requirements for an MIS transfer system for California and associated MIS contractor services that will be included in the RFP.

The SME services may be provided either by “in-house” staff or subcontracted.

B. Prepare an Implementation Advanced Planning Document (IAPD) Update for submission to the USDA

The consultant(s) will prepare draft and final versions of an IAPD Update that will be used to formally inform the USDA in writing that California plans to conduct the eWIC MIS and EBT projects concurrently including the concurrent roll-out of the systems across the state. The IAPD Update will align and consolidate the timeline and budget for the eWIC MIS and EBT projects as appropriate. The SME Consultant will assist as needed in development of the IAPD Update.

C. Status Reporting – Due: Monthly until RFP release

1. Meet weekly with the Contract Manager and Project Management Team.
2. Provide input and participate in monthly Project Steering Committee meetings.
3. Prepare ad hoc status reports, as requested, and in a format approved by the CDPH.
4. Maintain an acquisition document library, including relevant emails, memos, and other documents that provide a comprehensive audit history of the procurement.
5. Prepare written project status reports every two weeks. The report content shall include, but not be limited to, the following sections. The final format and content areas need to be approved by the CDPH.
 - a. Work Completed within the Reporting Period: Identifies tasks accomplished within the reporting period and the status of associated deliverables.
 - b. Work in Progress: Identifies activities currently underway.
 - c. Scheduled Status: Compares completed tasks and deliverables against those scheduled to date.
 - d. Work to be Completed: Identifies activities and deliverables which are expected to be completed within the next reporting period.
 - e. Issues, Risks, Problems and Resolutions: Highlights key issues and concerns, which may need to be prioritized and addressed by the consultant(s) and CDPH. Resolutions to previous problems will be reported, as well as, mitigation recommendations to new problems and risks.

D. Unanticipated Hours for Scope of Work Tasks (*Total estimated hours: 190*)

1. CDPH will allocate an additional 190 hours to perform unanticipated tasks that may occur during the term of this agreement as outlined above. These hours must be authorized by CDPH's project coordinator and will be reimbursed at that same hourly rate as identified in Attachment 5 of the approved Agreement.

Note: CDPH project coordinator will work with the Contractor to determine an appropriate timeline for project activities in accordance with the above project deliverables/task.

Attachment 2 Cover Sheet

<p>The submission of this response does not obligate the California Department of Public Health (CDPH), Women, Infants and Children (WIC) Program to fund the proposed Purchase Order. If the response is approved for funding, a Purchase Order will be executed between the State of California and the contractor. When funding is authorized, the offeror will be expected to adhere to the terms of the executed Purchase Order.</p> <p>The undersigned offeror hereby proposes to furnish all labor, materials, tools and equipment, to provide services in accordance with the specifications and provisions received with the RFO.</p> <p>The offeror shall append a statement to this cover sheet to explain the Scope of Work to be performed by the subcontractor, the reason for having a subcontractor's participation and the subcontractor's qualifications to fulfill the tasks in the Scope of Work.</p>				
Full Legal Name of Contractor's Organization				
Mailing Address		City	State	Zip
Telephone Number ()	Fax Number ()	Email		
Federal Taxpayer Identification Number		DUNS Number		
Contractor's Contact Person		Contact Person's Telephone Number ()		
Enter information below for the principal who is authorized to bind the contractor.				
Typed Name		Title		
Original Signature			Date (mm/dd/yyyy)	

**Attachment 3
Mandatory Requirements – Acquisition Specialist(s)**

The Acquisition Specialist consultant(s) offered must have experience in the areas listed below. Failure to not answer 'yes' to any of these items will result in the offeror's response being disqualified from further evaluation. A completed form is required for each proposed staff person.

Key Staff Name: _____ Company Name: _____

Experience	Yes	No	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of relevant experience.	Reference Information: Name, E-Mail Address, Phone Number
<i>Every proposed Acquisition Specialist staff must meet the following mandatory requirements.</i>					
A. Minimum of three (3) years of experience performing RFP development and acquisition specialist services.					
B. At least one engagement of at least six (6) months in length that involved procurement for an enterprise-wide effort with multiple stakeholders for an organization of at least the size and complexity of California WIC.					
C. At least six (6) months of experience preparing and writing bid solicitation documents such as RFPs for a governmental entity.					
D. Provide a complete resumé of the relevant experience for each proposed contractor staff person to support the contractor's ability to perform the activities and produce the deliverables identified in the Scope of Work, Attachment 1. Resumé entries should clearly demonstrate that the experience requirements described in the Mandatory Requirements, Attachment 3 of this RFO, are also met.					

**Attachment 3
Mandatory Requirements – Subject Matter Expert**

The SME Consultant offered must satisfy the mandatory requirements listed in the table below. Failure to not answer 'yes' to any of these items will result in the offeror's response being disqualified from further evaluation.

Key Staff Name: _____ Company Name: _____

Experience	Yes	No	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of relevant experience.	Reference Information: Name, E-Mail Address, Phone Number
<i>The one (1) consultant offered by the offeror to provide SME services must satisfy all mandatory qualifications identified below.</i>					
A. Minimum five (5) years of experience working with state level WIC Programs in a staff, consulting and/or management capacity.					
B. Minimum three (3) years of experience working with state-level WIC MIS transfer systems authorized by the USDA. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC MIS transfer systems at the state level.					
C. Minimum three (3) years of experience working with state-level WIC EBT systems integrated with EBT-ready MIS transfer systems. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC EBT systems at the state level.					
D. Provide a complete resumé of the relevant experience for the proposed contractor staff person to support the contractor's ability to perform the activities and produce the deliverables identified in the Scope of Work, Attachment 1. Resumé entries should clearly demonstrate that the experience requirements described in the Mandatory Requirements, Attachment 3 of this RFO are also met.					

**Attachment 4
Desirable Qualifications – Acquisition Specialist(s)**

Desirable qualifications of the Acquisition Specialists must not overlap with the mandatory requirements of the Acquisition Specialists in Attachment 3. Complete a separate form for each proposed staff person.

Key Staff Name: _____ Company Name: _____

Experience	Yes	No	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of relevant experience.	Reference Information: Name, E-Mail Address, Phone Number
A. Additional years of experience providing RFP development and acquisition specialist services to California state agencies and departments.					
B. Additional years of experience providing RFP development and acquisition specialist services to governmental entities other than California state agencies and departments.					
C. Years of experience performing RFP development and acquisition specialist services for the procurement of a system integrator to configure and implement an off-the-shelf system for a government entity.					
D. Years of experience working with state-level WIC MIS transfer systems authorized by the USDA. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC MIS transfer systems at the state level.					

**Attachment 4
Desirable Qualifications – Subject Matter Expert**

The Desirable qualifications of the SME must not overlap with the mandatory requirements for the SME in Attachment 3.

Key Staff Name: _____ Company Name: _____

Experience	Yes	No	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of relevant experience.	Reference Information: Name, E-Mail Address, Phone Number
A. Additional years of experience working with state level WIC Programs in a staff, consulting and/or management capacity.					
B. Additional years of experience working with state-level WIC MIS transfer systems authorized by the USDA. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC MIS transfer systems at the state level.					
C. Additional years of experience working with state-level WIC EBT systems integrated with EBT-ready MIS transfer systems. This experience must consist of tasks related to the planning, requirements specification, procurement, development, testing and/or implementation of WIC EBT systems at the state level.					

**Attachment 5
Cost Worksheet**

Offeror's Leverage Procurement Agreement (LPA) Number: _____

Note: Pricing shall include labor, materials, supplies, travel costs, all applicable taxes, and any other cost incurred to provide the specified services. For each task, list the CMAS classification and the related hourly rate, estimated hours, and total dollars. The estimated hours for each staff proposed must total the number of hours shown below. Identify subcontractor with an asterisk after the name of classification.

Major Tasks	Cost of Major Tasks																				
<p>1. Scope of Work tasks</p> <ul style="list-style-type: none"> • Facilitate development and approval of the RFP for eWIC MIS Design, Development and Implementation (DD&I) contractor • Prepare Implementation Advanced Planning Document (IAPD) update for submission to the USDA • Status Reporting <table border="1" style="width:100%; border-collapse: collapse; margin-top: 20px;"> <thead> <tr> <th style="width:35%;">Classification</th> <th style="width:20%;">Hourly Rate</th> <th style="width:15%;">Est. Hours</th> <th style="width:30%;">Total</th> </tr> </thead> <tbody> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td>Total, Scope of Work tasks</td> <td> </td> <td style="text-align:center;">1,870</td> <td> </td> </tr> </tbody> </table>	Classification	Hourly Rate	Est. Hours	Total		\$		\$		\$		\$		\$		\$	Total, Scope of Work tasks		1,870		<p>Total, Scope of Work tasks (Not to exceed \$250,000)</p> <p style="font-size: 1.2em;">\$ _____</p>
Classification	Hourly Rate	Est. Hours	Total																		
	\$		\$																		
	\$		\$																		
	\$		\$																		
Total, Scope of Work tasks		1,870																			
<p>2. Unanticipated Hours for Scope of Work Tasks</p> <table border="1" style="width:100%; border-collapse: collapse; margin-top: 20px;"> <thead> <tr> <th style="width:35%;">Classification</th> <th style="width:20%;">Hourly Rate</th> <th style="width:15%;">Est. Hours</th> <th style="width:30%;">Total</th> </tr> </thead> <tbody> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td> </td> <td style="text-align:center;">\$</td> <td> </td> <td style="text-align:center;">\$</td> </tr> <tr> <td>Total, Unanticipated Hours</td> <td> </td> <td style="text-align:center;">190</td> <td> </td> </tr> </tbody> </table>	Classification	Hourly Rate	Est. Hours	Total		\$		\$		\$		\$		\$		\$	Total, Unanticipated Hours		190		<p>Total, Unanticipated Hours for Scope of Work tasks (Not to exceed \$25,000)</p> <p style="font-size: 1.2em;">\$ _____</p>
Classification	Hourly Rate	Est. Hours	Total																		
	\$		\$																		
	\$		\$																		
	\$		\$																		
Total, Unanticipated Hours		190																			
<p>OFFER GRAND TOTAL, Scope of Work and Unanticipated Hours, (Not To exceed \$275,000)</p>	<p style="font-size: 1.2em;">\$ _____</p>																				

Name of Firm: _____

Signature and Printed Name _____

Date: _____

**Attachment 6
Customer Reference List
(Offeror)**

The offeror must provide information for the customer referenced on each Attachment 7, Offeror Customer Experience Reference Form submitted with the contractor's response. A minimum of three (3) references is required. Attach an additional sheet to this attachment if you are providing more than seven (7) references.

REFERENCE #1

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #2

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #3

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #4

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #5

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #6

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #7

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

**Attachment 6A
Customer Reference List
(Acquisition Specialist)**

The Acquisition Specialists must provide information for the customer referenced on each Attachment 7A, Acquisition Specialist Customer Experience Reference Form submitted with the contractor's response. Attach an additional sheet to this attachment if you are providing more than seven (7) references. Each proposed staff person must submit a Customer Reference List.

REFERENCE #1

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #2

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #3

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #4

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #5

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #6

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #7

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

**Attachment 6B
Customer Reference List
(SME Consultant)**

The SME Consultant must provide information for the customer referenced on each Attachment 7B, SME Consultant Customer Experience Reference Form submitted with the contractor's response. Attach an additional sheet to this attachment if you are providing more than seven (7) references.

REFERENCE #1

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #2

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #3

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #4

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #5

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #6

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

REFERENCE #7

Company/Organization (providing reference)

Contact	Telephone Number ()	Fax Number ()	Email
---------	-------------------------	-------------------	-------

**Attachment 7
Customer Experience Reference Form
(Offeror)**

<p>This form must be completed for each customer reference listed on Attachment 6, Offeror Customer Reference List. Details regarding completing and submitting this form are found in Section 2.2. RFO Response Guidelines.</p>				
Contractor's Name				
Company/Organization (providing reference)				
Contact	Telephone Number ()	Fax Number ()	Email	
Address		City	State	Zip
Project Name				
Project Description (limit 500 characters)				
Contractor's Involvement				
Project Start Date (mm/dd/yyyy)	Project End Date (mm/dd/yyyy)	Project Dollar Amount \$		
<p>Briefly describe the work completed for this customer. The description of the work must be detailed and comprehensive enough to permit the State to assess the similarity of this work to the work anticipated in the award of the Purchase Order resulting from this procurement. (limit 5,000 characters) (you may use a separate page)</p>				

**Attachment 7A
Customer Experience Reference Form
(Acquisition Specialist)**

This form must be completed for each customer reference listed on Attachment 6A, Acquisition Specialist Customer Reference List. Details regarding completing and submitting this form are found in Section 2.2. RFO Response Guidelines. Each proposed staff person must submit a Customer Experience Reference Form.

Contractor's Name

Company/Organization (providing reference)

Contact

Telephone Number

Fax Number

Email

()

()

Address

City

State

Zip

Project Name

Project Description (limit 500 characters)

Contractor's Involvement

Project Start Date (mm/dd/yyyy)

Project End Date (mm/dd/yyyy)

Project Dollar Amount

\$

Briefly describe the work completed for this customer. The description of the work must be detailed and comprehensive enough to permit the State to assess the similarity of this work to the work anticipated in the award of the Purchase Order resulting from this procurement. (limit 5,000 characters) (you may use a separate page)

**Attachment 7B
Customer Experience Reference Form
(SME Consultant)**

This form must be completed for each customer reference listed on Attachment 6B, SME Consultant Customer Reference List. Details regarding completing and submitting this form are found in Section 2.2. RFO Response Guidelines.

Contractor's Name

Company/Organization (providing reference)

Contact

Telephone Number

Fax Number

Email

()

()

Address

City

State

Zip

Project Name

Project Description (limit 500 characters)

Contractor's Involvement

Project Start Date (mm/dd/yyyy)

Project End Date (mm/dd/yyyy)

Project Dollar Amount

\$

Briefly describe the work completed for this customer. The description of the work must be detailed and comprehensive enough to permit the State to assess the similarity of this work to the work anticipated in the award of the Purchase Order resulting from this procurement. (limit 5,000 characters) (you may use a separate page)

**Attachment 8
Reference Rating Form
(Offeror)**

To Offeror: This form must be completed for three (3) customer references listed on Attachment 6, Offeror Customer Reference List, and included in your response package. Do not include more than three (3) completed Reference Rating Forms.			
Name of Company/Organization (Offeror)			
To Customer Reference: Please complete this form, answer the five questions below, and sign and date this form. Return it to the Company/Organization from whom you received it. Your responses will be considered in our overall assessment of this Offeror for a California Department of Public Health WIC Program procurement.			
Company/Organization (Customer)			
Address			State
			Zip
Name of Person Completing Reference Response		Telephone Number ()	Email
Project Name			
Project Start Date (mm/dd/yyyy)		Project End Date (mm/dd/yyyy)	
		Project Dollar Amount \$	
Brief Project Description (limit 500 characters)			
Please answer the following according to this rating system 1 = Unsatisfactory 3 = Highly Satisfactory 2 = Satisfactory 4 = Exceeded Expectations			
How would you rate your overall satisfaction with this contractor in the following? (Check one box for each question.)			
1. Completed planning project deliverables on time. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	2. Produced quality work products, including status reports, feasibility studies, and/or FNS IAPD 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	3. Communicated effectively with the project team, steering committee and/or the stakeholder groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	
4. Provided excellent facilitation of meetings with stakeholders and other groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)		5. Provided clear and thorough presentations regarding the progress of the project to the steering committee, project management team and/or other oversight groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	
Signature of Person Completing Reference Response			Date (mm/dd/yyyy)

**Attachment 8A
Reference Rating Form
(Acquisition Specialist)**

To Offeror: This form must be completed for three (3) customer references listed on Attachment 6A, Acquisition Specialist Customer Reference List, and included in your response package. Do not include more than six (6) completed Reference Rating Forms. Each proposed staff person(s) must complete a Reference Rating Form.			
Name of Company/Organization (Offeror)			
To Customer Reference: Please complete this form, answer the five questions below, and sign and date this form. Return it to the Company/Organization from whom you received it. Your responses will be considered in our overall assessment of this Acquisition Specialist for a California Department of Public Health WIC Program procurement.			
Company/Organization (Customer)			
Address			State
			Zip
Name of Person Completing Reference Response		Telephone Number ()	Email
Project Name			
Project Start Date (mm/dd/yyyy)		Project End Date (mm/dd/yyyy)	
		Project Dollar Amount \$	
Brief Project Description (limit 500 characters)			
Please answer the following according to this rating system 1 = Unsatisfactory 3 = Highly Satisfactory 2 = Satisfactory 4 = Exceeded Expectations <hr style="border: 0.5px dashed black;"/> How would you rate your overall satisfaction with this Contractor in the following? (Check one box for each question.)			
1. Completed planning project deliverables on time. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	2. Produced quality work products, including status reports, feasibility studies, and/or FNS IAPD 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	3. Communicated effectively with the project team, steering committee and/or the stakeholder groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	
4. Provided excellent facilitation of meetings with stakeholders and other groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	5. Provided clear and thorough presentations regarding the progress of the project to the steering committee, project management team and/or other oversight groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)		
Signature of Person Completing Reference Response			Date (mm/dd/yyyy)

**Attachment 8B
Reference Rating Form
(SME Consultant)**

To Offeror: This form must be completed for three (3) customer references listed on Attachment 6B, SME Consultant Customer Reference List, and included in your response package. Do not include more than three (3) completed Reference Rating Forms.			
Name of Company/Organization (Offeror)			
To Customer Reference: Please complete this form, answer the five questions below, and sign and date this form. Return it to the Company/Organization from whom you received it. Your responses will be considered in our overall assessment of this Acquisition Specialist for a California Department of Public Health WIC Program procurement.			
Company/Organization (Customer)			
Address			State
Name of Person Completing Reference Response			Telephone Number ()
Project Name			Email
Project Start Date (mm/dd/yyyy)		Project End Date (mm/dd/yyyy)	
Project Dollar Amount		\$	
Brief Project Description (limit 500 characters)			
Please answer the following according to this rating system 1 = Unsatisfactory 3 = Highly Satisfactory 2 = Satisfactory 4 = Exceeded Expectations			
How would you rate your overall satisfaction with this Contractor in the following? (Check one box for each question.)			
1. Completed planning project deliverables on time. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	2. Produced quality work products, including status reports, feasibility studies, and/or FNS IAPD 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (3 pts) (6 pts)	3. Communicated effectively with the project team, steering committee and/or the stakeholder groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	
4. Provided excellent facilitation of meetings with stakeholders and other groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)		5. Provided clear and thorough presentations regarding the progress of the project to the steering committee, project management team and/or other oversight groups. 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> (0 pts) (1 pts) (2 pts) (4 pts)	
Signature of Person Completing Reference Response			Date (mm/dd/yyyy)

Attachment 9
Confidentiality Statement

As an authorized representative and/or corporate officer of the company named below, I warrant my company and its employees will not disclose any documents, diagrams, information and information storage media made available to us by the State and marked confidential for the purpose of responding to this RFO or in conjunction with any contract arising there from. I warrant that only those employees who are authorized and required to use such materials will have access to them.

I further warrant that all materials provided by the State will be returned promptly after use and that all copies or derivations of the materials will be physically and/or electronically destroyed. I will include with the returned materials, a letter attesting to the complete return of materials, and documenting the destruction of copies and derivations. Failure to so comply will subject this company to liability, both criminal and civil, including all damages to the State and third parties. I authorize the State to inspect and verify the above.

I warrant that if my company is awarded the Purchase Order, it will not enter into any agreements or discussions with a third party concerning such materials prior to receiving written confirmation from the State that such third party has an agreement with the State similar in nature to this one.

Signature of Representative		Date (mm/dd/yyyy)
Typed Name of Representative		Typed Name of Company

Attachment 10

State of California Department of Technology
eWIC Management Information System (eWIC MIS) Project
CONFLICT OF INTEREST AND CONFIDENTIALITY CERTIFICATION

The objective of maintaining confidentiality is to ensure the integrity of the procurement process, prevent any bidder/proposer from gaining an unfair advantage, and minimize the likelihood of protests or lawsuits. It is important to understand that the disclosure of certain confidential or procurement-sensitive information could jeopardize the procurement timeline or the entire procurement. Individuals involved in the procurement must be careful to avoid a breach of confidentiality both inside and outside of the workplace. Current and potential individuals working on the procurement are required to sign a Conflict of Interest and Confidentiality Certification prior to entering into discussions related to the procurement.

CERTIFICATION

I certify the following:

- I have read and understand the Conflict of Interest provisions specified by the Fair Political Practices Commission (FPPC) as identified in the Conflict of Interest presentation located at <http://www.fppc.ca.gov>.
- I, my spouse and dependent children have no personal or financial interest and no present or past employment or activity, which would be incompatible with my participation in any activity, related to the planning or procurement processes for the WIC Management Information Systems (hereinafter "eWIC MIS")
- I agree not to accept any gift, benefit, gratuity or consideration, or begin a personal or financial interest with a party who is proposing/bidding, or associated with a proposer, on the Project.
- I will keep confidential and secure and will not copy, give or otherwise disclose to any other party outside of the State procurement team who has not signed a copy of this confidentiality agreement, any information concerning, but not limited to, the planning, processes, development or procedures of the procurement which I learn in the course of my duties on the Project.
- I will not disclose any information to participants in the bidding process which might give a bidder, subcontractor or supplier an unfair competitive advantage.
- I understand that if I leave the Project before it ends; I must still keep all procurement information confidential until the procurement process is final and an award has been made or the procurement is cancelled, whichever occurs first.
- I agree to follow any instructions provided by the Procurement Official for the Project relating to the confidentiality of procurement information.
- I understand that disclosure of confidential/sensitive information that may jeopardize the procurement may result in civil or criminal penalties and/or disciplinary action.
- I agree to advise the Department of Technology's Procurement Official, Becky Fatur, (916) 431-5558, immediately in the event that I either learn or have reason to believe that any person who has access to confidential information has or intends to disclose that information in violation of this agreement or has a conflict of interest.

Date: _____

Printed Name: _____ Signature: _____

Title: _____ Organization: _____ Project Role: _____

Telephone Number: _____ Email Address: _____

Attachment 11

FNS Required Federal Provisions

The implementation contractor must comply with the following provisions:

1. Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, and as supplemented by the Department of Labor Regulations (41 CFR Part 60): The Executive Order prohibits federal contractors and federally-assisted construction contractors and s who do over \$10,000 in Government business in one year from discriminating in employment decisions on the basis of race, color, religion, sex, or national origin. The Executive Order also requires Government contractors to take affirmative action to ensure that equal opportunity is provided in all aspects of their employment.
2. The Clean Air Act, Section 306:
 - a. No Federal agency may enter into any contract with any person who is convicted of any offense under section 113(c) for the procurement of goods, materials, and services to perform such contract at any facility at which the violation which gave rise to such conviction occurred if such facility is owned, leased, or supervised by such person. The prohibition in the preceding sentence shall continue until the Administrator certifies that the condition giving rise to such a conviction has been corrected. For convictions arising under section 113(c)(2), the condition giving rise to the conviction also shall be considered to include any substantive violation of this Act associated with the violation of 113(c)(2). The Administrator may extend this prohibition to other facilities owned or operated by the convicted person.
 - b. The Administrator shall establish procedures to provide all Federal agencies with the notification necessary for the purposes of subsection (a).
 - c. In order to implement the purposes and policy of this Act to protect and enhance the quality of the Nation's air, the President shall, not more than 180 days after enactment of the Clean Air Amendments of 1970 cause to be issued an order (1) requiring each Federal agency authorized to enter into contracts and each Federal agency which is empowered to extend Federal assistance by way of grant, loan, or contract to effectuate the purpose and policy of this Act in such contracting or assistance activities, and (2) setting forth procedures, sanctions, penalties, and such other provisions, as the President determines necessary to carry out such requirement.
 - d. The President may exempt any contract, loan, or grant from all or part of the provisions of this section where he determines such exemption is necessary in the paramount interest of the United States and he shall notify the Congress of such exemption.
 - e. The President shall annually report to the Congress on measures taken toward implementing the purpose and intent of this section, including but not limited to the progress and problems associated with implementation of this section. [42 U.S.C. 7606]
3. The Clean Water Act:
 - a. No Federal agency may enter into any contract with any person who has been convicted of any offense under Section 309(c) of this Act for the procurement of goods, materials, and services if such contract is to be performed at any facility at which the violation which gave rise to such conviction occurred, and if such facility is owned, leased, or supervised by such person. The prohibition in preceding sentence shall continue until the Administrator certifies that the condition giving rise to such conviction has been corrected.
 - b. The Administrator shall establish procedures to provide all Federal agencies with the notification necessary for the purposes of subsection (a) of this section.

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- c. In order to implement the purposes and policy of this Act to protect and enhance the quality of the Nation's water, the President shall, not more than 180 days after the enactment of this Act, cause to be issued an order:
 - (1) requiring each Federal agency authorized to enter into contracts and each Federal agency which is empowered to extend Federal assistance by way of grant, loan, or contract to effectuate the purpose and policy of this Act in such contracting or assistance activities, and
 - (2) setting forth procedures, sanctions, penalties, and such other provisions, as the President determines necessary to carry out such requirement.
 - d. The President may exempt any contract, loan, or grant from all or part of the provisions of this section where he determines such exemption is necessary in the paramount interest of the United States and he shall notify the Congress of such exemption.
 - e. The President shall annually report to the Congress on measures taken in compliance with the purpose and intent of this section, including, but not limited to, the progress and problems associated with such compliance.
 - f. (1) No certification by a contractor, and no contract clause, may be required in the case of a contract for the acquisition of commercial items in order to implement a prohibition or requirement of this section or a prohibition or requirement issued in the implementation of this section.

(2) In paragraph (1), the term "commercial item" has the meaning given such term in section 4(12) of the Office of Federal Procurement Policy Act (41 U.S.C. 403(12)).
4. The Anti-Lobbying Act: This Act prohibits the recipients of federal contracts, grants, and loans from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. As required by Section 1352, Title 31 of the U.S. Code and implemented at 34 CFR Part 82 for persons entering into a grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Section 82.105 and 82.110, the applicant certifies that:
- a. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the making of any federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal grant or cooperative agreement;
 - b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;
 - c. The undersigned shall require that the language of this certification be include in the award documents for all sub-awards at all tiers (including sub-grants, contracts under grants and cooperative agreements, and subcontracts) and that all sub-recipients shall certify and disclose accordingly.
5. Americans with Disabilities Act: This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public by State and local governments, except public transportation services.

6. Drug Free Workplace Statement: The Federal government implemented the Drug Free Workplace Act of 1988 in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides. Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:
 - a. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the work place.
 - b. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
 - c. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
 - d. Although alcohol is not a controlled substance, it is nonetheless a drug. It is the policy of the California Department of Public Health WIC Program that abuse of this drug will also not be tolerated in the workplace.
 - e. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.
7. Debarment, suspension, and other responsibility matters: As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Sections 85.105 and 85.110.
 - a. The applicant certifies that it and its principals:
 - (1) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
 - (2) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
 - (4) Have not within a three-year period preceding this application had one or more public transactions (federal, state, or local) terminated for cause or default.
 - b. Where the applicant is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.
8. The federal government reserves a royalty-free, non-exclusive, and irrevocable license to reproduce, publish, or otherwise use, and to authorize others to use, for federal government purposes, the copyright in any work developed under a grant, sub-grant, or contract under a grant or sub-grant or any rights of copyright to which a contractor purchases ownership.