State of California—Health and Human Services Agency

California Department of Public Health

RON CHAPMAN, MD, MPH
Director & State Health Officer

EDMUND G. BROWN JR.
Governor

REQUEST FOR OFFER

RFO #: 2014-03

For:

Women, Infants, and Children (WIC) Program Integrated Statewide Information System (ISIS) VAGen Conversion to Rational (VCR)

For:

IT CONSULT-PROGRAMMING, IT CONSULT-SYSTEMS INTEGRATION, and IT CONSULT-SOFTWARE DEVELOP

Date: April 28, 2014

You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these services, you must comply with the instructions contained in this document as well as the requirements stated in the State's Statement of Work (SOW), Attachment A and B. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO and your proposed CMAS contract.

Read the attached document carefully. The RFO due date is: May 30, 2014 by 3:00pm, PST.

Responses to this RFO, your California Multiple Award Schedule (CMAS) contract and any required copies must be submitted by hand delivery or mailed, clearly labeled to the department contact noted below.

Department Contact:
California Department of Public Health
Public Health Application Technology Section (PHATS)
Attention: Wahid Bouzid
1615 Capitol Avenue, Room #73.335
MS 6600, P.O. Box 997377
Sacramento, CA 95899-7377

1. SECTION I – GENERAL INFORMATION

1.1 Introduction

You are invited to review and respond to this Request for Offer (RFO). To submit an offer for this RFO, you must comply with the instructions contained in this document as well as the requirements stated in the *Attachment 1- Statement of Work* (SOW) of this document. 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 and submit your response no later than **Tuesday, May 30, 2014 by 3:00pm PST**.

1.2 Purpose

The purpose of this RFO is to solicit responses from qualified vendors to provide development, implementation, and installation services for the conversion of IBM VisualAge® Generator (VAGen) application development environment to the IBM Rational Suite Applications of Rational Business Developer (RBD), Rational Team Concert (RTC), and Rational Functional Tester (RFT). The selected contractor will convert the VAGen source code to the IBM's Rational RBD's programming language Enterprise Generation Language (EGL). The contractor will also install, configure, and interface the Rational applications with the Windows Server, Mainframe platform, and client workstations for the Integrated Statewide Information System (ISIS). In addition, the contractor will provide technical and system knowledge transfer to selected CDPH - ITSD staff for ongoing system support and maintenance. The specific tasks and deliverables associated with this RFO are included in the *Attachment 1 - Statement of Work* (SOW), of this document.

1.3 Background

The California Department of Public Health (CDPH), Women, Infants, and Children (WIC) Program serves low-income pregnant and post-partum women, infants and children under the age of five who have nutritional risks. The goal of the Program is to decrease the risk of poor birth outcomes and to improve the health of participants during critical times of growth and development. To meet this goal, the Program provides nutrition education, breastfeeding promotion, medical care referrals, and specific supplemental nutritious foods. The Program is federally funded and administered at the national level by the U.S. Department of Agriculture (USDA).

The WIC Program contracts with eighty-four (84) Local Agencies to provide services to approximately 1.6 million participants per month at over 650 clinic sites throughout the state. The WIC Program's management information system – Integrated Statewide Information System (ISIS) was developed in the early 1990s as an online mainframe system using a DB2 relational database and was fully implemented in 1996. ISIS handles 2.6 million online transactions daily, with a 0.04 second average response time. During the WIC participant certification process, information is documented in ISIS, such as demographic, anthropometric, biochemical, and nutrition indicators for WIC eligibility. ISIS has an appointment scheduling module and applicant screening module, both of which are used heavily by WIC local agency staff in managing the type and flow of participants through WIC local offices. ISIS handles the food prescription portion of the certification process by issuing a set of 3 to 5 Food Instruments (FI) per participant; each FI includes a list of 4 to 6 food items. WIC local agency staff print out FIs for each participant in the family, resulting in approximately 5 million paper FIs printed monthly. Files containing FI serial numbers from ISIS are created and transferred nightly to the California State Treasurer's Office (STO). The STO also receives electronic image replacement documents or batches of physical FIs from the retail food stores' presenting banks. The STO runs a series of edits using both sets of files to determine which FIs to pay and which FIs to reject. Files containing the paid and reject information are electronically transferred back to ISIS to record the proper food instrument status.

ISIS is consisting of Visual Age Generator applications generated to COBOL CICS applications that is augmented by two primary auxiliary systems: Vendor WIC Information eXchange (VWIX) and the WIC Information eXchange (WIX). Grocers receive reimbursement for accepting the FIs by submitting the FI serial numbers through the File Transfer Protocol (FTP) files by entering the serial numbers using the VWIX web interface. VWIX was developed using Microsoft's Internet Information Server (IIS) platform and was written in ASP.NET and VB.NET programming languages. WIX provides reporting capabilities to State and WIC local agency staff in the form of 23 standard reports and an ad hoc reporting functionality which allows staff to create custom reports. WIC local agency staff access WIX through a web browser and use SAP Business Objects (BO) to run reports populated with data supplied by database queries. The federated reporting database is segmented into several BO universes, each designed to meet a specific reporting need. The BO universes are created by presenting ISIS mainframe data in a user-friendly manner designed to facilitate report creation. IBM's Query Management Facility (QMF) is also used to supplement this reporting environment by allowing advanced users to write their own SQL queries and execute them directly, avoiding the BO interface. See Attachment 1A – Technical Specifications for detail information.

1.4 Key Action Dates

The timeline below lists key events, dates, and times by which an action shall be completed. The dates are approximate and may be changed if needed to allow CDPH additional time for evaluation and Purchase Order execution. If the State finds it necessary to change any of these dates, an addendum will be sent though an e-mail.

Event		Date
1.	Release of RFO	April 28, 2014
2.	Submission of Written Questions	May 5, 2014
3.	Response to Written Questions	May 19, 2014
4.	RFO Response Submission Due Date (by 3:00pm, PST)	May 30, 2014
5.	Mandatory Interviews (Week of)	June 16th
6.	Anticipated Award (Week of)	June 23, 2014
7.	Consultant Staff Begin (when contract is signed)	August 1, 2014
8.	Contract Ends (12 months or earlier from the purchase order approval date)	June 30, 2015

1.5 Offerors' Questions

All offerors are encouraged to carefully review all pages of this RFO. All questions, comments, and concerns should be immediately e-mailed to Marilyn Beauchamp at Marilyn.Beauchamp@cdph.ca.gov on or before **May 5, 2014**. All answers to questions will be posted on the CDPH- WIC Program's website http://www.cdph.ca.gov/programs/wicworks/Pages/default.aspx on May 19, 2014.

Responding 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 responding 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 offeror or is marked "Confidential," the State will respond only to the inquirer if the State concurs with the responding 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 responding 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

1.5.1.1 Inquirer's name, name of firm submitting the question or inquiry, mailing address, e-mail address, telephone number with area code, and fax number with area code.
1.5.1.2 A description of the subject or issue in question or discrepancy found.
1.5.1.3 RFO section, page number or other information useful in identifying the specific problem or issue in question.
1.5.1.4 Remedy sought, if any.

1.5.2 Question Deadline

Submit questions and inquiries no later than the date and time stated in 1.4 Key Action Dates above.

1.6 Offeror's Interviews and Presentation

This RFO will require an interview with any or all offerors, See 1.4 Key Action Dates above. The CDPH will schedule interview(s) with the three highest rated offerors based on their administrative, narrative, qualifications, references, and cost scores from the submitted offers. Key staff, such as Project Lead and Technical Lead identified by the offeror must participate in the interview. The selection team expects proposed staff to describe their understanding of the job and their approach to performing the work. The proposed staff in attendance will be asked a predetermined set of questions to assess their experience and qualifications. The proposed technical lead staff must deliver a presentation on their project approach, their vision to complete all deliverables, and their past experience with projects similar to this project.

1.7 Cost

The estimated amount for this contract is $499,999. Offers received shall not be greater than $499,999 for this service; any offers exceeding this amount will be rejected.

1.8 Agreement

The resulting agreement shall not exceed twelve (12) months, and it is also 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. All payments made under this Agreement will be in accordance with California Government Code sections 926 through 927, et seq. (Prompt Payment).

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

1.9 Agreement Availability

The Contractor must be able to meet the requirements of this RFO and be ready to begin work within ten (10) business days of the start date of the Purchase Order.

1.10 Changes to Contractor Staff

Personnel commitments made in the contractor's proposal shall not be changed without prior written approval, unless in the case of resignation or death of any named individual. CDPH shall approve in advance and in writing any full-time or temporary changes to the contractor's personnel.

1.11 Use of Subcontractors

This Contractor is required to identify any subcontracts for this agreement. The Contractor must list the firm name, address, and contact person's information including phone number with area code, email address and mailing address. Any subcontractors will be subject to all the terms, conditions and requirements of the contract, including signing confidentiality, privacy, security, conflict of interest and other necessary agreements. The Contractor is responsible for the subcontractor as if they are employees of their firm.

1.12 Cancellation

This RFO may be cancelled and any or all proposals rejected in whole or in part, without liability, when it is determined to be in the best interest of the State of California. Any or all offers to this RFO may be rejected if the State does not receive USDA Food and Nutrition Services (FNS) funding required for proceeding with the project and subsequent contract.

This Agreement may be canceled or terminated by CDPH without cause upon thirty (30) calendar days advance written notice to the contractor. Such notification shall state the effective date of the termination or cancellation and include any final performance, payment, or invoicing requirements.

1.13 Contractor Staff Location

Services shall be performed at the CDPH headquarters in the East End Complex located on 1615 Capitol Avenue, Sacramento, CA 95814.

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 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 ITSD Project Manager.

1.14 Deliverable-Based Contract

The hours projected for each identified deliverable will be used to assess the reasonableness of the contractor's offer. The contractor may not invoice the State for any costs exceeding the maximum amount identified to complete a deliverable. Any excess shall not be a cost to the State. Any other contractor costs not specifically included in the RFO or not specifically authorized in writing by the State will not be reimbursed by the State.

No reimbursement for travel and lodging will be made under this agreement.

2. SECTION II - CONTRACTOR OFFER GUIDELINES

2.1 RFO Response Requirements

Responses must contain all requested information and data and conform to the format described in this section. It is the offeror's responsibility to provide all information necessary for the State to evaluate the response, verify requested information and determine the offeror's ability to perform the tasks defined in the *Attachment 1 - Statement of Work (SOW).*

2.2 RFO Response Content

The Scoring Team will evaluate and score each offer based on adherence to the instructions and response to the RFO requirements. The three highest scoring offers will be scheduled for interviews.

The offeror must provide three (3) copies of response including the following six (6) parts:

2.2.1 Part 1- Cover Letter

The cover letter must include the title and number of this RFO as well as the offeror's information listed below:

2.2.1.1 Contractor name, contact information and address as listed on the CMAS contract.
2.2.1.2 CMAS contract number and term dates
2.2.1.3 Small Business number (if applicable)
2.2.1.4 DVBE certification number (if applicable)
2.2.1.5 Total offer amount
2.2.1.6 Signature of an individual authorized to enter into contracts for the offeror.
2.2.1.7 Include a copy your CMAS contract

2.2.2 Part 2 - Response to Attachment 1 - Statement of Work

The offeror's response to *Attachment 1 - Statement of Work* will be used to evaluate responsiveness to the requirements. The narrative response must map each task item back to the *Attachment 1 - Statement of Work*. The response must include any additional information that the offeror deems necessary to explain how the offeror intends to meet the State's requirements. The narrative needs to contain the following as appropriate:

2.2.2.1 Overview of the required tasks and outcomes
2.2.2.2 Description of how the tasks will be performed
2.2.2.3 A list of assumptions used to develop the offer.
2.2.2.4 A description of any additional State responsibilities you believe are necessary but are not identified.
2.2.2.5 A description of any additional offeror responsibilities you believe are necessary but are not identified

2.2.3 Part 3 - Response to Attachment 2, 2A – Key Staff Qualifications

For each proposed staff person, complete the *Attachments 2 and 2 A - Mandatory Qualifications and Desirable Qualifications*.

Each proposed team member must have experience in at least one area listed on the Attachment 2. However, experience in all areas must be addressed collectively as a team. Failure to meet the mandatory qualifications will result in disqualification of the proposal.

Additionally, the offeror must propose two candidates to serve as lead: one as Project Lead and another as a Technical Lead for this project. The proposed staff persons must meet the following requirements:

2.2.3.1 The Project Lead must have a minimum of five (5) years of broad and extensive project management experience. At least three (3) years of that experience must be in a lead capacity in the application of information technology or business practices projects, and

2.2.3.2 Must have three (3) years of experience in managing the business issues associated with project requirements and in-depth experience with managing the day-to-day operations of the project.

2.2.3.3 The Technical Lead must have a minimum of three (3) years' professional experience in using and performing the Rational Suite applications services and developing technical/functional documentation.

2.2.3.4 Provide a complete resume of the relevant experience for each proposed contractor staff person(s) to support the contractor's ability to perform the activities and produce the deliverables identified in *Attachment 1 – Statement of Work*. Resume entries should clearly demonstrate that the experience requirements described in *Attachment 2 – Mandatory Qualifications* of this RFO are also met.

2.2.4 Part 4 - Response to Attachment 3 - Cost Data Sheet

The cost sheet identifies the CMAS classification, hourly rate and estimated hours per deliverable that will be used to review the "reasonableness" of the offer. The maximum payable under this contract is $499,999.

2.2.5 Part 5 - Response to Attachment 4, 4A, 4B, and 4C – Offeror and Proposed Staff's Reference Forms

Provide three (3) references for the offeror's company and Proposed Staff to support the offeror's ability to perform the tasks identified in the *Attachment 1 – Statement of Work.*

2.2.6 Part 6 - Response to Miscellaneous Forms

2.2.6.1 Attachment 1A - Technical Specifications, no response needed.
2.2.6.2 Attachment 5- Response to Confidentiality Statement, The responding contractor must sign, date, and submit.
2.2.6.3 Attachment 6- FNS Required Federal Provision, no response needed.

2.3 Interviews and Presentation

The Offeror's Technical Lead Staff must conduct a presentation on their project approach, including their vision to complete all deliverables, and their past experience with similar projects. The Offeror's Technical Lead Staff may include the following areas:

2.3.1 The Proposed Staff's understanding of the SOW that emphasizes the functions and major activities of this RFO that must be performed to complete the work, including examples from previous projects that validate the ability to perform the work.
2.3.2 The Proposed Staff's activities and approach that will be performed to complete the required work.
2.3.3 The Proposed Staff's expectations for project members and stakeholders outside of their own team.
2.3.4 The Proposed team's qualifications and abilities.

2.4 Where to Send Offer

Responses to this RFO, your California Multiple Award Schedules (CMAS) contract and the three (3) required copies must be hand delivered or mailed to the address below:

Delivery Address:	Mailing Address:
California Department of Public Health Information Technology Services Division Public Health Application Technology Section (PHATS) **Attn: Wahid Bouzid** 1615 Capitol Avenue, Room #73.335, MS 6600 Sacramento, CA 95899-7377	California Department of Public Health Information Technology Services Division Public Health Application Technology Section (PHATS) **Attn: Wahid Bouzid** 1615 Capitol Avenue, Room #73.335 MS 6600, P.O. Box 997377 Sacramento, CA 95899-7377

3. SECTION III – RFO EVALUATION INFORMATION

3.1 Evaluation Process

Each response to this proposal will be reviewed for the presence of all required information in conformance with the submission requirements. If the required information is not submitted and the Mandatory Qualifications are not met, the submitted response will not be further evaluated.

3.2 Evaluation Criteria

The evaluation criterion consists of seven (7) parts: Administrative Requirements, Narrative of Statement of Work, Cost, Mandatory Qualifications, Desirable Qualifications, References, and Contractor Interviews/Presentation.

3.2.1. Administrative Requirements Criteria (Pass/Fail)

The administrative items listed in the table below are required. If the offeror's claim on the Appendix 1 -Response Checklist cannot be proven or substantiated, the offeror will be disqualified from further evaluation.

Administrative Requirements	
1.	RFO Response: Required Three (3) Copies
2.	Cover Letter Subcontractor Information (if applicable) Copy of CMAS Contract
3.	Attachment 1 – Statement of Work, Narrative
4.	Attachment 2 – Mandatory Qualifications
5.	Attachment 2A – Desirable Qualifications
6.	Attachment 3 – Cost Sheet
7.	Attachment 4 –Reference Form (Responding Offeror)
8.	Attachment 4A, 4B. 4C –Reference Form (Project Manager, Technical Lead and Project Team Member)
9.	Attachment 5– Confidentiality Statement

3.2.2 Attachment 1 - Statement of Work, Narrative (50 Points):

NARRATIVE		POSSIBLE POINTS
1.	Provide a description of your understanding of the project's goals and the SOW.	10 points
2.	Describe the activities and deliverables the proposed team will perform to complete the required work and accomplish the project goals.	10 points
3.	Describe the methods, tools and standards that will be used to complete the tasks identified in the SOW.	20 points
4.	Estimate the number of state staff resources, skills and capabilities that will be required for implementation.	10 points

3.2.3 Attachment 2 - Proposed Staff - Mandatory Qualifications (Pass/Fail)

Complete the *Attachment 2 – Mandatory Qualifications* form. The mandatory qualifications are required to pass the initial step of evaluation of the response.

3.2.4 Attachment 2A Proposed Staff - Desirable Qualifications (20 points)

Complete the *Attachment 2A – Desirable Qualifications* form. Additional points will be awarded if proposed contract staff also has skills/experience listed in the desirable qualifications.

3.2.6 Attachment 3 - Cost Sheet (60 points)

Complete *Attachment 3 – Cost Sheet*. The offeror's costs shall be no greater than the rates stated in their Information Technology Project Planning CMAS contract, and shall include labor, materials, supplies, travel costs, applicable taxes, and any other cost incurred to provide the services described in *Attachment 1 - Statement of Work*.

3.2.5 Attachment 4, 4A, 4B, and 4C - References (20 points)

Three (3) Reference Forms and Customer Experience Reference Forms (*Attachment 4, 4A, 4B, and 4C*) must be submitted for each responding offeror and proposed staff.

3.2.7 Interview and Presentation (50 points)

Once the evaluation has been completed, the three (3) offerors with the highest number of points will be selected for interviews. The team (proposed offeror's lead staff) 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 team. The proposed technical lead staff must deliver a presentation on their project approach, their vision to get all deliverables done, and their past experience with projects similar to this project.

3.2.8 "Best Value" Methodology

Award of a contract resulting from this RFO against a CMAS will be based on a "best value" method that includes cost as a factor. The "best value" methodology with point values is shown below.

"Best Value" Methodology	Percentage	Possible Points
Administrative Requirements	Pass/Fail	
Narrative – Statement of Work	25%	50 points
Proposed Staff - Mandatory Qualifications	Pass/Fail	
Proposed Staff - Desirable Qualifications	10%	20 points
References	10%	20 points
Cost	30%	60 points
Offerors Interviews and Presentations	25%	50 points
TOTAL	**100%**	**200 Points**

3.3 Scoring Methodology

The Scoring Team will evaluate each offer received by the due date and time.

STEP	EVALUATION	IF THIS, THEN
1.	The Scoring Team will evaluate offers for compliance with the Administrative Requirements Criteria listed in the *Appendix 1 – Response Checklist*.	The offers that pass this requirement will proceed to Step 2.
2.	The Scoring Team will evaluate and score each of the Rating Criteria's.	The scores awarded will be used towards calculating "Best Value".
3.	The Scoring Team will evaluate the offeror's response to the Narrative requirements listed in *Attachment 1 – Statement of Work.*	The scores awarded will be used towards calculating "Best Value".
4.	The Scoring Team will review and evaluate proposed contractor staff qualifications in accordance with *Attachment 2 – Mandatory Qualifications Form.*	The offers that pass this requirement will proceed to Step 5.
5.	The Scoring Team will review and evaluate proposed contractor staff qualifications in accordance with *Attachment 2A – Desirable Qualifications Form.*	The scores awarded will be used towards calculating "Best Value". Offers that pass this requirement will proceed to Step 6.
6.	The Scoring Team will evaluate the Reference Forms (*Attachment 4, 4A, 4B, and 4C*) for both offeror and proposed contracted staff.	Points will be awarded, based on available points described in each Rating Form. Scores will be used towards calculating "Best Value".
7.	The Scoring Team will evaluate and score each offer based on merit against the scoring criteria and adherence to the instructions and response to the RFO requirements.	The three highest scoring offers will be scheduled for interviews.
8.	The scores from Steps 2, 3, 4, 5 including interview scores will be calculated to determine each offeror's final score.	The Contractor with the highest score will be deemed "Best Value".

3.4 Example of "Best Value"

An example of the "best value" calculation with sample contract amounts for three (3) offers is displayed below:

	OFFER #1	OFFER #2	OFFER #3
SOW Narrative (Combined Points)	40 Points	48 Points	43 Points
Staff Qualifications (Combined Points)	20 Points	19 Points	18 Points
References (Combined Points)	15 Points	14 Points	19 Points
Total Points	75 Points	81 Points	80 Points
Cost Submitted	$400,000	$420,000	$475,000
Cost Calculation	$400,000/$400,000=1.0	$400,000/$420,000=0.95	$400,000/$475,000=0.84
Cost Points	1.0 x 60 = 60.0 Points	0.95 x 60 = 57 Points	0.84 x 60 = 50.4 Points
Total Points	60 Points	57 Points	50.4 Points
Points Subtotal	40+20+15+60=135 Pts	48+19+14+57=138 Pts	43+18+19+50.4=130.4 Pts
Interviews (Combined Points)	40 Points	43 Points	38 Points
GRAND TOTAL	40 + 60 + 20 + 15 + 40 = **175.0 Points**	48 + 57 + 19 + 14 + 43 = **181 Points**	43 + 50.4 + 18 + 19 + 38 = **168.4 Points**
In this example, the award goes to Offer #2 with the highest grand total points.			

4. SECTION IV - Additional Terms and Conditions

4.1 General Provisions

4.1.1 CDPH must approve any Contractor staffing changes in advance of the change.

4.1.2 Travel cost is included in the approved CMAS hourly rate and will not be paid separately.

4.1.3 Unless explicitly stated otherwise in Attachment 1, entitled Statement of Work, all deliverables will be provided in Microsoft© Office 2010 format in a version readable by CDPH WIC Program. This applies to word processing documents, spreadsheets, presentations and databases.

4.2 Invoicing and Payment Guidelines

4.2.1 For deliverables satisfactorily completed and approved by the State, and upon receipt and approval of the invoices, the State agrees to compensate the Contractor for actual expenditures incurred to produce those deliverables in accordance with the rates and/or allowable costs specified herein but not to exceed the total cost for those deliverables as proposed by the Contractor and stated in the Purchase Order.

4.2.2 The State will apply a ten (10) percent withhold to all invoices. The State will pay the total amount withheld upon completion of the project as approved by the State and after the final invoice is submitted. The final invoice must be clearly labeled as such.

4.2.3 Invoices shall be in triplicate and include the Purchase Order number. Invoice shall be submitted to:

California Department of Public Health
WIC Nutrition Program
Attn: Budget and Accounting Section
Mail Station 8600
P.O. Box 997375
Sacramento, CA 95899-7375

4.2.4 Invoices shall

4.2.4.1 Be prepared on the Contractor's letterhead. If invoices are not produced on letterhead, invoices must be signed by an authorized official, employee or agent certifying that the expenditures claimed represent actual expenses for the service performed under this Purchase Order.

4.2.4.2 Bear the Contractor's name as shown on the Purchase Order.

4.2.4.3 Bear a billing date and invoice number (if applicable).

4.2.4.4 Include a remittance address where payments are to be sent.

4.2.4.5 Identify the deliverable covered by the invoice.

4.2.4.6 Include submission of a monthly status report detailing the last month's accomplishments and planned work activities for the next month.

5 SECTION V – ATTACHMENTS

Attachment 1 - Statement of Work (SOW)

This Statement of Work (SOW) reflects the contractor services to be provided by the contractor for CDPH. This SOW is governed by and incorporates by reference the terms and conditions of the CMAS. This will be a deliverable-based contract. The Contractor shall submit invoices and will receive payment upon CDPH- IT acceptance and approval of each deliverable.

1.0 Scope and Description

The purpose of this AGREEMENT is to obtain consultant services to convert the ISIS application that is written in IBM's Visual Age Generator (VAGen) to IBM's programming language Enterprise Generation Language (EGL) of Rational Business Developer (RBD). The contractor will also perform the configuration, installation, integration, and verification of RBD, Rational Team Concert (RTC) and Rational Functional Tester (RFT). In addition, the contractor will provide knowledge transfer and formal training to designated CDPH - ITSD staff on the new programming development environment with EGL, using the RTC for integrating task tracking and source control, and using the RFT in creating scripts, transforming recorded scripts into reusable script segments, and combing script segments to create new scripts for the Mainframe and Web applications.

1.1 Contractor's Primary Functions

The primary functions of this contract are to:

1.1.1 Convert source codes from VAGen to Rational RBD - EGL
1.1.2 Install and configure RBD to interface with RTC and DB2 V9.1 or latest.
1.1.3 Verify that Rational EGL code compiled for CICS COBOL executes correctly on the Mainframe environment of CICS/TS 4.1 and DB2 V9.1 or latest.
1.1.4 Configure RTC to support the Change Management methodology.
1.1.5 Verify RFT installation and configuration and train CDPH-ITSD staff in creating, transforming recorded scripts into reusable script segments, and combing script segments to create new scripts for the Mainframe Green Screen and Web applications.
1.1.6 Provide training and knowledge transfer to CDPH-ITSD staff on the methods, tools, techniques and activities used to perform the deliverables of this contract. The purpose of Knowledge Transfer is to provide CDPH-ITSD staff with the knowledge and abilities to conduct services to perform their duties and maintain the data system.

2.0 Deliverables

This Contract is deliverable-based which shall end when all deliverables are met and approved by the CDPH. The period of performance of this agreement shall be from the day the Purchase Order is signed by the CDPH that is estimated to start on or about **July 1, 2014 and shall not exceed 12 months.** At a minimum, the contractor must provide to the State, for review and acceptance, the following deliverables:

2.1 Deliverable #1- Business Assessment Report and Project Management Plan

2.1.1 The Contractor will initially conduct a business assessment and will prepare a Business Process Assessment (BPA) Report that outlines the current configuration and change management processes, user interfaces, and file and database access functions.

2.1.2 The Contractor will develop a Project Management Plan (PMP) that will build upon the preliminary plan presented in the contractor's offer and BPA Report to map out conversion strategies and to identify anomalies in the plan that presents risks to the project. During development of the PMP, the contractor will work closely with the CDPH-ITSD Project Manager and ITSD Program Lead.

2.1.3 The PMP must include protocols for handling exceptions in which urgent application code changes must be completed in the middle of a code conversion.

2.1.4 The PMP must be developed in Microsoft Project that includes timelines, milestones, tasks, CDPH- ITSD resource requirements needed, with anticipated start and end dates, and deliverables that are agreed upon by both parties.

2.1.5 The Contractor will deliver the PMP within thirty (30) days after the purchase order execution.

2.2 Deliverable #2 - Software Application Requirements Setup & Configuration

Perform all business rules and requirements for all three Rational Suite applications listed below:

2.2.1 Rational Business Developer (RBD)

2.2.1.1 Perform installation and configuration of RBD on Windows 7 workstations.

2.2.1.2 Perform installation and configuration of the Rational COBOL Runtime Services for zSeries on the mainframe.

2.2.1.3 Ensure RBD functions with DB2 version (v) 9.1 or later running on a Z/OS v1.13 mainframe platform so that developers can utilize the integrated test facility.

2.2.1.4 Ensure RBD interfaces with RTC to allow code check-out and check-in.

2.2.1.5 Ensure RBD interfaces with the mainframe to allow generation of executables for the mainframe. The targeted runtime environment is CICS/TS 4.1 and DB2 v 9.1 or later.

2.2.1.6 Verify that Rational EGL code compiled for CICS COBOL executes correctly on the mainframe environment of CICS/TS 4.1 utilizing DB2 v 9.1 or later as the primary data source.

2.2.2 Rational Team Concert (RTC)

2.2.2.1 Work with the CDPH Project Manager and Lead to select the best Change Management methodology.
2.2.2.2 Perform installation and configuration server components on virtual servers running Windows Server 2008.[1]
2.2.2.3 Perform installation and configuration workstation components on personal computers running Windows 7.
2.2.2.4 Migrate the converted EGL source code for the ISIS application into RTC.
2.2.2.5 Ensure RTC configured to support the chosen methodology.
2.2.2.6 Verify migration of source code changes done via management of executables and/or builds of executables work correctly.
2.2.2.7 Migrate all testing scripts developed by RFT to the RTC

2.2.3 Rational Functional Tester (RFT)

2.2.3.1 Verify installation and configuration of the product on personal computers running Windows 7.
2.2.3.2 Train CDPH-ITSD staff in creating, transforming recorded scripts into reusable script segments, and combing script segments to create new scripts for Web and Mainframe applications.

2.3 Deliverable #3 - Code Conversion

2.3.1 The Contractor will perform conversion of all VAGen application code to the RBD – EGL. It will be a coordinated effort involving the CDPH-ITSD staff; initially, the contractor will receive a copy of the existing application code of the ISIS system. The conversion and migration phase must allow flexibility for CDPH-ITSD to continue modifying existing ISIS application code in Visual Age Generator to meet program business, maintenance, and operational needs. Contracted staff will be responsible for converting and migrating any newly modified Visual Age Generator code after the successful implementation of initial conversion of codes. The Contractor will:

2.3.1.1 Perform conversion for all VAGen application code to the RBD - EGL.
2.3.1.2 Generate all EGL codes to CICS COBOL.
2.3.1.3 Perform quality assurance and validation to ensure that RBD/EGL code can generate COBOL and successfully run on the mainframe environment.

2.4 Deliverable #4 – Testing

2.4.1 Perform system integration and testing to ensure the proper functionality and performance of the system.
2.4.2 Work collaboratively with CDPH - ITSD staff to perform user acceptance testing to ensure proper functionality and performance of the Rational application suite.
2.4.3 Modify the system based on results from user acceptance testing and regression testing.
2.4.4 Upon successful completion of the user acceptance testing, as determined by the CDPH-ITSD Project Lead, contractor will prepare a report documenting the result of acceptance testing.

[*] Server version could change based on the State protocol.

2.5 Deliverable #5 – Implementation

2.5.1 The contractor will validate:

2.5.1.1 All Rational Suite applications (RBD, RTC, and RFT) are installed and configured.
2.5.1.2 All VAGen codes have been converted and generated into CICS COBOL applications.
2.5.1.3 ISIS is running in a production environment utilizing generated code from RBD-EGL.

2.5.2 Develop and provide an implementation plan describing the processes of how the implementation will be done.
2.5.3 Contractor warrants that the Rational Development environment hereunder shall be free from defect in design and implementation and will continue to meet the specifications agreed to during application migration and Contractor will, without additional charge to the State, correct any such defect and make such additions, modifications, or adjustments to the application as may be necessary to operate in accordance with the deliverables.

2.6 Deliverable #6 - Training and Knowledge Transfer

2.6.1 The Contractor will provide hands on experience with formal and informal training to the CDPH-ITSD's selected staff so that staff will be able to independently perform task(s).
2.6.2 The Contractor will perform an analysis of the CDPH-ITSD's selected staff skills in performing day to day functions of writing codes in RBD/ EGL, migration of codes to the RTC and creating scripts with RFT.
2.6.3 The Contractor will develop a Training and Knowledge Transfer Plan on the following topics:

2.6.3.1 Using RBD and its programing language EGL for code writing.
2.6.3.2 Developing scripts that will allow RTC to interface with the mainframe running Z/OS v1.13 to handle code promotion from/to various CICS test and production region.
2.6.3.3 Creating advanced testing scripts in RFT for web and mainframe applications.
2.6.3.4 Ongoing maintenance and operation of the Rational application suite.

2.6.4 The Contractor will obtain CDPH-ITSD approval for specific training topic, content, and estimated time for completion for each session described in the Training and Knowledge Transfer Plan.

2.7 Deliverable #7 – System Documentation and User Materials

2.7.1 Technical documentation with detail system and files configuration, versioning standards, and step-by-step instructions on performing enhancement and bug fixes needed for on-going maintenance and to support the Rational environment.

2.7.2 The materials and documents support contractor's training of CDPH- ITSD staff on the operation and support of the application. These materials would also be used as ongoing reference material by the current and new CDPH staff in the future as they operate the application.

2.8 Deliverable # 8- Project Status Reports

2.8.1 On a bi-weekly basis, the contractor Project Lead shall meet with the CDPH-ITSD Project Manager to provide a verbal status report.

2.8.2 On a monthly basis, the contractor shall provide the CDPH-ITSD Project Manager a written project status report in Microsoft Word format. The Status Report shall clearly outline progress for the prior month and it shall include:

- 2.8.2.1 Task accomplishments
- 2.8.2.2 Percent of completion of project deliverables
- 2.8.2.3 Identification of barriers, problems or concerns (if any) and planned remedies or solutions
- 2.8.2.4 Activities planned for the next reporting period
- 2.8.2.5 Other relevant information to assist in monitoring the project's progress
- 2.8.2.6 Identification of risks that compromise project deliverables and/or project timeline
- 2.8.2.7 Expenditures Report to date.

Once the status report is reviewed and accepted by the CDPH -ITSD Project Manager, this project status shall be returned to the Contractor to forward it to the Budget and Accounting Section of the WIC program address provided in **Section IV under 4.6 Invoicing and Payment Guidelines** for payment.

2.9 Deliverable # 9 - Required Meetings

The Contractor's Project Lead and Technical Lead shall be required to attend all project team meetings in person or via video conferencing or conference call. Project team meetings will be a bi-weekly unless otherwise agreed to by the State and the Contractor based on the business needs.

2.10 Deliverable # 10 – Post Implementation

2.10.1 For a period of 2 months after implementation, the Contractor will be available to provide support to:

2.10.1.1 Resolve issues related to the installation and configuration of the Rational products

2.10.1.2 Resolve application issues caused by the conversion process from VAGen to EGL.

2.10.2 The Contractor will not be responsible for application issues resulting from programming errors.

3.0 Technical Components

Development, testing and implementation of the RBD, RTC, and RFT will consist of the following technical components. See Attachment 2 A-Technical Specifications for additional system information.

3.1 Operating System –Mainframe Z/OS and Windows Server 2003
3.2 Data Management System – SQL and DB2
3.3 Client Server – Windows 7

4.0 Technical Platform

The Rational suite applications shall be installed and configured according to California Technology Agency (CTA) and CDPH's technical standards including network server technology, network communication, and application development. Refer to the CDPH Information Security Office's Information

5.0 Contractor Responsibilities - SOW

The Contractor is required to provide technically qualified personnel(s) who shall complete the activities according to the SOW agreed to by both the State and Contractor. It is contractor staff's responsibility to:

5.1 Provide the CDPH Project Manager the status and/or resolution of previously identified issues and new issues identified that might impact the timely completion of the defined tasks or deliverables. Report should indicate how the contractor plans to get back on track if the project falls behind schedule.
5.2 Work collaboratively with the CDPH Project Manager to follow State-established practices for issue, risk, change management, and other project management processes.
5.3 Update the Project Plan after each project activity is completed.
5.4 Make available all project deliverables in electronic format in a collaborative effort between the Contractor, State project manager, and project team. Supply hard copies of deliverables, if requested to CDPH –ITSD staff .

6.0 CDPH Responsibilities

6.1 CDPH will provide appropriate work space, desk, chair, telephone, PC, Internet connection, card key, and assess to printer, copier and fax services.
6.2 The State will purchase and install all hardware and software applications required for migration.
6.3 CDPH will provide access to IT staff and other essential staff to assist in completing the SOW.
6.4 CDPH - IT Project Manager will convene meetings with individuals or groups that are necessary for the Contractor to complete the SOW.
6.5 CDPH will provide timely review and approval of the deliverables provided by the contractor in order for the contractor to perform its obligations under the contract. The contractor should allow for a minimum of **five business days** for CDPH to review any deliverable unless agreed to otherwise in advance.
6.6 CDPH will provide payment based on the completion and acceptance of specific deliverables as identified in the Cost Sheet - Attachment 3.

Attachment 1A - Technical Specification

1.0 Integrated Statewide Information System (ISIS) Technical Components

The ISIS system, ISIS data, and reporting data are centralized at the California Technology Agency (CTA) and consist of the following components:

1.1 ISIS Application Specification and Environment

1.1.1 Centralized on CTA z/OS v1.13 mainframe in Vacaville
1.1.2 Online real time system supported by daily, weekly, and monthly batch jobs
1.1.3 IBM's Visual Age Generator
- 4GL Development Tool
- Generates COBOL/CICS executable code

1.1.4 COBOL Batch Jobs; JCL
1.1.5 Total Number of Visual Age Applications: 1054
1.1.6 Number of Visual Age Applications with Display Maps: 540
1.1.7 Number of Visual Age Applications with Printable Maps: 6
1.1.8 Number of Visual Age Applications with DB2 access: 374
1.1.9 Number of Visual Age Tables: 180
1.1.10 Number of Visual Age Envy Applications/Projects: 222
1.1.11 Visual Age Generator version: 5.0

1.2 ISIS Database/Environment

1.2.1 Relational Database – IBM DB2 for z/OS V9R1M0
1.2.2 IBM z/OS v1.13;
1.2.3 IBM CICS Transaction Server for z/OS V4.1
1.2.4 206 DB2 tables
- Billion records

1.2.5 Database file size = 380 gigabytes (Use of DB2 Data Compression where appropriate)

1.3 OS39 Database

1.3.1 Relational Database – IBM DB2 for z/OS V9R1M0
1.3.2 Operating System - IBM z/OS v1.13
1.3.3 200 tables in the production database
1.3.4 1.053 billion records
1.3.5 Database file size = 240 gigabytes (Significant use of DB2 Data Compression)

1.4 ISIS TCP/IP Network Including Hardware

1.4.1 Thin Clients – Windows CE Operating System with the ICA client and tn3270
1.4.2 PC or Laptop with NIC, TCP/IP, 3270 emulation
1.4.3 Dot matrix printers – Lexmark 2390, Memorex 1330, Talley Genicom T2265
1.4.4 Local Agencies connect to ISIS via dedicated T1/T3 data circuits installed and maintained by CTA.
1.4.5 Remote clinics connect to agency hub WAN (dial-up, VPN, Intranet, etc.)
1.4.6 Print Server – Any Ethernet print server that supports LPR printing

2.0 Ancillary Systems to ISIS

2.1 WIC Information Exchange (WIX)

The system allows Local Agencies throughout the State to securely access the California Technology Agency (CTA) and their data for caseload, participation, appointment, and outreach purposes. It also creates a secure repository for source code and reports.

2.1.1 Provides a secure, single-point access to WIC Local Agencies and other business partners
2.1.2 There are approximately 325 WIX users
2.1.3 Applications available to authorized users logged in to the WIC Extranet are:

2.1.3.1 Business Objects standardized “canned” and adhoc reporting environments.
2.1.3.2 Custom Applications: Autodial; ISIS News

2.2 Vendor WIC Information Exchange (VWIX)

The Vendor WIC Information Exchange (V-WIX) web-based system allows WIC Authorized Vendors the ability to securely transmit (via FTP, Web or other identified method) Food Instrument (FI) serial numbers that WIC participants have exchanged at the vendor location prior to the vendor depositing the physical FIs in their local bank. Vendors also have the ability to run reports on their transmissions and FI status as well as view and download their appropriate Maximum Allowable Rates to help set shelf prices.

2.2.1 VWIX is fully operational for all active WIC Vendors (approximately 2,212 Contracts, 5,211 Vendors).
2.2.2 There are approximately 4800 VWIX users located throughout the state of California.
2.2.3 Vendors must submit their check numbers through VWIX in order to receive payment. Approximately 4.5 million checks per month.

Attachment 2 – Key Staff – Mandatory Qualifications

At a minimum, each proposed team member must have experience in at least one area listed below. Failure to complete this attachment may be cause for rejection of the offer. A minimum of three references for each contractor staff person is required.

Key Staff Name: ____ Company Name: ________________________________

	Experience	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of each project.	Reference Information: Name, E-Mail Address, Phone Number
	Propose one candidate to serve as a Project Lead for the Project. *The proposed staff must meet the following mandatory requirements.*			
1	Mandatory: The Project Lead must have minimum five (5) years of broad and extensive project management experience. At least three (3) years of that experience must be in a lead capacity in the application of information technology or business practices projects.			
2	Mandatory: Must have minimum three (3) years experience in managing the business issues associated with project requirements and in-depth experience with managing the day-to-day operations of the project.			
	Propose one candidate to serve as a Technical Lead for the Project. *The proposed staff must meet the following mandatory requirement.*			
1	Mandatory: The Technical Lead must have a minimum of three (3) years professional experience in using and performing the Rational Suite applications services and developing technical/functional documentation.			
	Proposed team must meet the following mandatory requirements.			
1	Mandatory: Minimum one (1) year professional experience using Rational Build Developer, Team Concert and Rational Functional Tester software.			
2	Mandatory: Prior experience converting Visual Age Generator source code to Enterprise Generation Language (EGL).			

	Experience	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of each project.	Reference Information: Name, E-Mail Address, Phone Number
3	Mandatory: Prior experience installing and configuring Rational Build Developer to interface with Team Concert and the mainframe			
4	Mandatory: Prior experience writing complex scripts for Team Concert used to migrate code through various testing and production environments on the mainframe			
5	Mandatory: Prior experience installing and configuring Team Concert on Window Servers utilizing the Apache Tomcat, SQL Server, and DB2 z/OS to interface with RBD and the mainframe			
6	Mandatory: Minimum 1 year professional experience using RFT to create testing scripts for Mainframe Green Screen Applications.			
7	Mandatory: Prior experience in working with CICS/TS in a z/OS Mainframe.			
8	Mandatory: Prior experience in working with JCL in a z/OS Mainframe.			

Attachment 2 A– Key Staff – Desirable Qualifications

Key Staff Name: ______________________________ Company Name: ________________________

	Experience	Years of Experience	Name of Project(s) and the relevant experience on the project(s). List dates of each project.	Reference Information: Name, E-Mail Address, Phone Number
	Desirable attributes will be applied and additional points will be awarded for the following:			
1	Desirable: The design and deployment of applications for California state agencies and departments. (5 Points)			
2	Desirable: Knowledge/experience working with Federal and State programs and organizations. (5 Points)			
3	Desirable: Qualifications and experience with projects similar in size and duration as the VAGen Conversion to Rational. (5 Points)			
4	Desirable: Project Management certification, such as Project Management Professional certification from the PMI or a degree in Project Management or a related discipline from an AACSB-accredited college or university. (5 Points) If PMP Certified please provide PMP Number. _________________	Yes ☐ No ☐		

Attachment 3 - Cost Sheet

Responding Contractor'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 deliverable, list the CMAS classification, delivery date, hourly rate, estimated hours, total cost of deliverable. Must indicate task/deliverable that will be completed by the subcontractor.

Deliverable	Cost of Deliverable
1. **Business Assessment Report and Project Management Plan**	$ ______________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

Deliverable	Cost of Deliverable
2. **Software Application Requirements Setup & Configuration**	$ ______________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

Deliverable	Cost of Deliverable
3. **Code Conversion**	$ ______________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

Deliverable	Cost of Deliverable
4. **Testing**	$ ______________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

5. **Implementation** ____________________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

$ __________

6. **Training and Knowledge Transfer** ____________________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

$ __________

7. **System Documentation and User Materials** ____________________

Classification	Hourly Rate	Est. Hours	Total
	$		$
	$		$
	$		$
	$		$

$ __________

8. **Project Status Reports** ____________________

Classification	Hourly Rate	Est. Hours	T□tal
	$		$
	$		$
	$		$
	$		$

$ __________

Responding Contractor'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 deliverable, list the CMAS classification, delivery date, hourly rate, estimated hours, total cost of deliverable. Must indicate task/deliverable that will be completed by the subcontractor.

Deliverable	Cost of Deliverable

9. **Required Meetings**____

Classification	Hourly Rate	Est. Hours	T□tal
	$		$
	$		$
	$		$
	$		$

Cost of Deliverable: **$** ____________

10. **Post Implementation**____

Classification	Hourly Rate	Est. Hours	T□tal
	$		$
	$		$
	$		$
	$		$

Cost of Deliverable: **$** ____________

GRAND TOTAL $ ____________

Attachment 4 - Reference Form
(Responding Offeror)

Complete three (3) Reference Forms for the Responding Offeror.						
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. (limit of 5,000 characters) (you may use a separate page)						

Attachment 4A - Customer Experience Reference Form
(Proposed Project Manager)

<table>
<tr><td colspan="12">Complete three (3) Reference Forms for the Proposed Project Manager</td></tr>
<tr><td colspan="12">Contractor’s Name</td></tr>
<tr><td colspan="12">Company/Organization (providing reference)</td></tr>
<tr><td colspan="3">Contact</td><td colspan="2">Telephone Number
(   )</td><td colspan="3">Fax Number
(   )</td><td colspan="4">Email</td></tr>
<tr><td colspan="5">Address</td><td colspan="4">City</td><td colspan="1">State</td><td colspan="2">Zip</td></tr>
<tr><td colspan="12">Project Name</td></tr>
<tr><td colspan="12">Project Description (limit 500 characters)</td></tr>
<tr><td colspan="12">Contractor’s Involvement</td></tr>
<tr><td colspan="4">Project Start Date (mm/dd/yyyy)</td><td colspan="4">Project End Date (mm/dd/yyyy)</td><td colspan="4">Project Dollar Amount
$</td></tr>
<tr><td colspan="12">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. (limit 5,000 characters) (you may use a separate page)</td></tr>
<tr><td colspan="12"></td></tr>
</table>

Attachment 4B - Customer Experience Reference Form (Technical Lead)

Complete three (3) Reference Forms for the Technical Lead.						
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. (limit 5,000 characters) (you may use a separate page)						

Attachment 4C - Customer Experience Reference Form (Project Team Member)

Complete three (3) Reference Forms for the Project Team Member.			
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. (limit 5,000 characters) (you may use a separate page)			

Attachment 5- 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

6 SECTION VI - APPENDIX

Appendix 1 - Response Checklist

	Administrative Requirements	Yes	No
1.	RFO Response: Three (3) Copies		
2.	Cover Letter Subcontractor Information (if applicable) Copy of your CMAS Contract		
3.	Attachment 1 – Statement of Work, Narrative		
3.	Attachment 2 – Mandatory Qualifications		
4.	Attachment 2A – Desirable Qualifications and resumes		
5.	Attachment 3 – Cost Sheet		
6.	Attachment 4 – Three Reference Form (Responding Offeror)		
7.	Attachment 4A – Three Reference Form (Proposed Contract Project Manager)		
8.	Attachment 4B – Three Reference Form (Proposed Contract Technical Lead)		
9.	Attachment 4C – Three Reference Form (Proposed Team Member)		
10.	Attachment 7 – Confidentiality Statement		