

## Request for Information – RFI #75001

**TO:** All Interested Parties

**FROM:** Office of Systems Integration (OSI), hereafter referred to as the “State”, is issuing this Request For Information (RFI) on behalf of the California Health and Human Services (CHHS) Agency

**SUBJECT:** RFI #75001, Agile Development Pre-Qualified (ADPQ) Vendor Pool

### 1. Overview

CHHS seeks to establish a pre-qualified vendor pool of up to 15 vendors that will provide the Agency with user-centered design and agile software development services. To facilitate that process, the Agency will establish the pre-qualified vendor pool using a process similar to the federal General Services Agency (GSA) Blanket Purchasing Agreement (BPA) model. Information about the GSA BPA is available at the following site: <https://18f.gsa.gov/2015/08/28/announcing-the-agile-BPA-awards/>.

Benefits of establishing a pre-qualified vendor pool include the following:

- Reduction in solicitation time
- Ability to review vendors’ user-centered design and agile software development competencies prior to soliciting bids
- Reduction in administrative costs to the State and vendors

On behalf of Agency, OSI is partnering with the Department of General Services (DGS), the California Department of Technology (CDT) Statewide Technology Procurement Division (STPD), and the federal GSA 18F consulting team to establish the pre-qualified vendor pool. The process will include:

1. The State releasing this RFI to interested parties, which includes both California Multiple Award Schedule (CMAS) vendors and non-CMAS vendors
2. The State will conduct a vendor Q&A web conference to address vendor questions related to the APDQ vendor pool process
3. In response to the RFI submission requirements, vendors will provide a functioning prototype and a narrative description of the technical approach used to create the prototype
4. The State, with the assistance of 18F, will review each vendor’s prototype and technical approach (e.g., use of user-centered design) to establish a list of highly-qualified vendors to provide user-centered design and agile software development services

After the initial ADPQ vendor pool has been established, CHHS departments will be able to develop and release ADPQ Request for Offers (RFOs) to the pre-qualified vendors. While a CMAS contract is not required to participate in the ADPQ vendor pool screening process, **all vendors will be required to have a valid CMAS contract using a GSA Federal Supply Schedule 70 base contract prior to responding to ADPQ RFOs.** See Attachment D - CMAS Contract Application Information for details regarding CMAS contract application process. See Attachment E - ADPQ RFO Information for details regarding ADPQ RFO process.

## 2. Child Welfare Digital Services (CWDS)

The first CHHS organization to utilize the ADPQ vendor pool and release ADPQ RFOs will be CWDS, which is replacing the existing Child Welfare Services/Case Management System (CWS/CMS) and Children's Residential Licensing system as part of the Child Welfare Services – New System (CWS-NS) project by developing a new technology platform and set of digital services that will be incrementally rolled out. These digital services will provide a more intuitive user experience and new capabilities not currently provided by legacy systems they are intended to replace. Digital services will include, but are not limited to the following:

- Children's Residential Licensing
- Case Management
- Resource Management
- Court Processing
- Eligibility
- Financial Management

## 3. ADPQ Vendor Pool Key Action Dates

Listed below are the RFI Key Action Dates and Times by which actions should be taken or completed.

Event	Date / Time
Release RFI	5/5/16
Vendor Pool Q&A Web Conference <ul style="list-style-type: none"> <li>• See <a href="#">ADPQ Web Page</a> for time</li> </ul>	5/13/16
Last Day to Submit Questions	5/26/16
Submission Due Date	6/9/16
Pre-Qualified Vendor Pool Selection	7/11/16

## 4. ADPQ Vendor Pool Instructions

- a. Vendors must submit responses by the date and time stated in Section 3 – ADPQ Vendor Pool Key Action Dates.
- b. Vendors must comply with all instructions and requirements set forth in the RFI.
- c. Vendors must submit responses to Attachment A - ADPQ Vendor Profile via email, in a Portable Document Format (PDF), to the contact listed in Section 7 – ADPQ Vendor Pool Contact Information, and include the following information in the email subject line: RFI #75001, ADPQ Vendor Pool Submission.

- d. Vendors must publish a repository consisting of all prototype source code, design assets, and all associated documentation that went into satisfying Attachment B - ADPQ Vendor Pool Submission Requirements, to an online and publicly accessible GitHub repository. Posting a repository in a different version control system will not be accepted. Vendors are allowed, and encouraged, to include any kind of documentation in the repository, including photographs, screenshots, or notes of their development and design process
- The timestamp of the most recent commit to the branch in the canonical repository to be reviewed will be the source that determines the timeliness of the delivery
  - The submitted prototype and supporting technical approach artifacts shall be preserved without modification until at least 30 calendar days after ADPQ vendor pool selection
  - The State intends to copy the selected ADPQ vendors' repository of source code and supporting technical artifacts for republication for a period of not less than 6 months after ADPQ vendor pool selection.

Completion of this RFI will be performed at no cost to the State in accordance with State Contract Manual Volume 3, Chapter 4, Section 4.A1.11.

## 5. ADPQ Vendor Pool Maintenance

The State will be responsible for maintaining the on boarding and off boarding vendors in the ADPQ vendor pool. This includes the following:

### a. On Boarding

- Determining the number of vendors that will be required in the ADPQ vendor pool
- Determining which vendors will be given the opportunity to participate in the ADPQ vendor pool
- Contacting the vendors and providing them with pre-qualification criteria
- Assessing vendor submissions to determine if they qualify for the ADPQ vendor pool
- Contacting vendors to inform them of their submission results and status
- Continuing to include more vendors until the optimum number of pre-qualified vendors has been reached (this can include clarification on responses submitted)
- Conducting additional vendor contact, receiving pre-qualification submissions and assessment as needed (approximately every six months) to maintain a certain level of available vendors

### b. Off Boarding

- A vendor may be removed from the ADPQ vendor pool and become ineligible to participate in any future ADPQ RFOs for one of the following reasons:
  - A vendor who has been awarded an ADPQ RFO whose contract has been terminated
  - A vendor has failed to submit an offer to an ADPQ RFO since the last time the ADPQ vendor pool was updated
  - A vendor has contacted the State and notified the State, in writing, to be taken out of the pool

- The State will contact the vendor to inform them in writing that they have been removed from the ADPQ vendor pool. The State will allow the terminating vendor five (5) business days to respond in writing to the State's procurement office.

## **6. ADPQ Vendor Pool Screening**

The ADPQ vendor pool screening process will be determined by a pass/fail compliance review and by a technical review of the vendor's working prototype and technical approach. The vendor's proposed mix of labor categories and level of effort for its working prototype shall be reviewed to assess the vendor's understanding and capability to supply user-centered design and agile software development services. The State intends to select vendors who achieve the highest rating in regards to their prototype and description of their technical approach. The three ratings associated with the screening and selection process are Exceptional, Acceptable and Non-Acceptable.

The following scenarios are conditions that shall constitute Non-Acceptable rating and will disqualify a vendor from being selected in the ADPQ vendor pool:

- a. If a commit is made to the branch subject to review after the Submission Due Date.
- b. If the code, or any design asset, of the prototype is changed on the GitHub server after the Submission Due Date.
- c. If accessing the prototype via the publicly-available URL identified at the top of the README.md file generates HTTP 4xx or 5xx errors.

## **7. ADPQ Vendor Pool Contact Information**

Amy Cooper  
Office of Systems Integrations  
Acquisition and Contracting Services Division  
[Amy.Cooper@osi.ca.gov](mailto:Amy.Cooper@osi.ca.gov)  
916-263-3264

## **8. ADPQ Vendor Pool Questions**

Vendors must submit questions regarding the ADPQ vendor pool, via email, by the Last Day to Submit Questions date stated in the Section 3 – Vendor Pool Key Action Dates to the contact listed in Section 7 – ADPQ Vendor Pool Contact Information. Each inquiry shall include the following information:

- a. RFI #75001, ADPQ Vendor Pool Question(s) in the subject line of the email
- b. Vendor name and contact, phone number, and email address.
- c. A description of the subject or issue in question, or discrepancy found.
- d. RFI section, page number, or other information useful in identifying the specific problem or issue stated in the in question.

# **Attachment A**

## **ADPQ Vendor Profile**

Attachment A - ADPQ Vendor Profile identifies contact information and summary of services that vendors are required to provide to the State as part of their ADPQ submission.

Vendors must submit responses to Attachment A - ADPQ Vendor Profile via email, in a Portable Document Format (PDF), to the contact listed in Section 7 – ADPQ Vendor Pool Contact Information, and include the following information in the email subject line: RFI #75001, ADPQ Vendor Pool Submission.

**Attachment A**  
**ADPQ Vendor Profile**

1. Vendor name, address, city, state, and zip code, and phone number of primary location.
2. Parent corporation name and/or subsidiaries, if applicable.
3. Brief company overview, including number of years in business, number of employees, nature of business, description of clients and Small Business/Micro Business/Disabled Veterans Business Enterprise status, if any.
4. Name, title, address, phone number, and email address of the primary and secondary contact persons.
5. URL that represents the git repository. If more than one branch is present, then note the specific branch that should be reviewed.

# **Attachment B**

## **ADPQ Vendor Pool Submission Requirements**

Attachment B - ADPQ Vendor Pool Submission Requirements provides requirements that vendors must satisfy in order to participate in the ADPQ vendor pool.

Vendors must publish a repository consisting of all prototype source code, design assets, and all associated documentation that went into satisfying Attachment B - ADPQ Vendor Pool Submission Requirements, to an online and publicly accessible GitHub repository.

A CMAS contract is not required as part of the ADPQ Vendor Pool Submission Requirements.

## Attachment B

### ADPQ Vendor Pool Submission Requirements

#### 1. Working Prototype

Vendors are required to submit a working prototype that demonstrates its agile software development capabilities. Include a publicly-available URL to your prototype at the top of a README.md file located in the root directory of your repository.

The working prototype will be an application that will allow parents of foster kids to establish and manage their profile, and view children's residential facilities in their zip code, and communicate with the case worker via a private inbox. The working prototype will access open data through the HHS API to retrieve data about [foster family agency locations](#) that are nearby. The working prototype does not need to implement any authentication or authorization against an external directory or authentication mechanism.

The submission of the working prototype serves as a sample task that the State believes is representative of the type of task orders that may be issued against the ADPQ vendor pool.

#### 2. Technical Approach

Write a brief description, no greater than 1000 words, of the approach used to create the working prototype and place this description in the README.md file located in the root directory of your repository.

In addition to the description, above, the Vendor must demonstrate that they followed the [U.S. Digital Services Playbook](#) by providing evidence in the repository. The README.md file should also make reference to the following:

- a. Assigned one leader and gave that person authority and responsibility and held that person accountable for the quality of the prototype submitted
- b. Assembled a multidisciplinary and collaborative team that includes, at a minimum, five of the labor categories as identified in Attachment C - ADPQ Vendor Pool Labor Category Descriptions
- c. Understood what people needed (see *Note #1*), by including people in the prototype development and design process
- d. Used at least three "human-centered design" techniques or tools
- e. Created or used a design style guide and/or a pattern library
- f. Performed usability tests with people
- g. Used an iterative approach, where feedback informed subsequent work or versions of the prototype
- h. Created a prototype that works on multiple devices, and presents a responsive design
- i. Used at least five modern (see *Note #2*) and open-source technologies, regardless of architectural layer (frontend, backend, etc.)
- j. Deployed the prototype on an Infrastructure as a Service (IaaS) or Platform as Service (PaaS) provider, and indicated which provider they used.



- k. Developed automated unit tests for their code
- l. Setup or used a continuous integration system to automate the running of tests and continuously deployed their code to their IaaS or PaaS provider.
- m. Setup or used configuration management
- n. Setup or used continuous monitoring
- o. Deployed their software in a container (i.e., utilized operating-system-level virtualization)
- p. Provided sufficient documentation to install and run their prototype on another machine
- q. Prototype and underlying platforms used to create and run the prototype are openly licensed and free of charge

*Note 1: The State understands it will be difficult to find people who would be credible actual users of the prototype, given the dataset. "People" here is to be understood as anyone not directly involved in the design or development of the prototype. Subsequent use of the word "People" in all the criteria should be understood to have the same definition as described in this footnote.*

*Note 2: "Modern" is to be understood as any technology or standard released, created, initiated or finalized in the 5 years preceding the release of this RFI. Any subsequent use of the word "Modern" in these criteria is to be understood as having the same definition as described in this note.*

# **Attachment C**

## **ADPQ Vendor Pool Labor Category Descriptions**

Attachment C - ADPQ Vendor Pool Labor Category Descriptions provides detailed description of the labor categories that are within scope of the ADPQ vendor pool and ADPQ RFOs.

In satisfying Attachment B - ADPQ Vendor Pool Submission Requirements, Vendors must assemble a multidisciplinary and collaborative team that includes, at a minimum, five of the labor categories as identified in Attachment C - ADPQ Vendor Pool Labor Category Descriptions.

In developing the ADPQ RFOs, the State will include one or more of the labor categories listed in Attachment C - ADPQ Vendor Pool Labor Category Descriptions. In preparing their offers, vendors will be required to map the GSA Federal Supply Schedule 70 job titles associated to their CMAS contract to the ADPQ labor categories included in each ADPQ RFO.

## Attachment C

### ADPQ Vendor Pool Labor Category Descriptions

The labor categories that are within scope of the ADPQ vendor pool and ADPQ RFOs are the following:

1- Product Manager	8 - DevOps Engineer
2 - Technical Architect	9 - Security Engineer
3 - Interaction Designer/User Researcher/Usability Tester	10 - Delivery Manager
4 - Writer/Content Designer/Content Strategist	11 - Agile Coach
5 - Visual Designer	12 - Business Analyst
6 - Front End Web Developer	13 - Digital Performance Analyst
7 - Backend Web Developer	

Table 1: ADPQ Vendor Pool Labor Categories

These labor categories are based on the GSA BPA labor categories that can be found here: <https://pages.18f.gov/agile-labor-categories/>.

#### 1. Product Manager

Experience managing the delivery, ongoing success, and continuous improvement of one or more digital products and/or platforms.

Primarily responsible for:

- Lead one or more multi-disciplinary agile delivery teams to deliver excellent new products and/or iterations to existing products to meet user needs
- Gather user requirements based on a communicable understanding of diverse audience groups
- Define and get stakeholder buy-in for product definition and delivery approach
- Create effective, prioritized product descriptions, and delivery plans to meet user needs in a cost-effective way
- Interpret user research in order to make the correct product decisions, noting that users do not always know what they want
- Continually keep abreast of changes to user habits, preferences, and behaviors across various digital platforms and their implications for successful delivery of agile software development services
- Underpin the delivery and iteration of agile software development services through effective analysis of qualitative and quantitative user data
- Communicate credibly with a wide range of digital delivery disciplines and talent

## 2. Technical Architect

Experience serving as the manager of complex technology implementations, with an eye toward constant reengineering and refactoring to ensure the simplest and most elegant system possible to accomplish the desired need.

Understands how to maximally leverage the open source community to deploy systems on infrastructure as a service providers. Comfortable with liberally sharing knowledge across a multi-disciplinary team and working within agile methodologies. A full partner in the determination of vision, objectives, and success criteria.

Primarily responsible for:

- Architecting the overall system, by using prototyping and proof of concepts, which may include:
  - modern programming languages (e.g., Ruby, Python, Node.js) and web frameworks (e.g., Django, Rails)
  - modern front-end web programming techniques (e.g., HTML5, CSS3, RESTful APIs) and frameworks (e.g., Twitter Bootstrap, jQuery)
  - relational databases (e.g., PostgreSQL), and “NoSQL” databases (e.g., Cassandra, MongoDB)
  - automated configuration management (e.g., Chef, Puppet, Ansible, Salt), continuous integration/deployment, and continuous monitoring solutions
- Use of version control systems, specifically Git and GitHub
- Ensuring strategic alignment of technical design and architecture to meet business growth and direction, and stay on top of emerging technologies
- Decomposing business and system architecture to support clean-interface multi-team development
- Developing product roadmaps, backlogs, and measurable success criteria, and writing user stories (i.e., can establish a path to delivery for breaking down stories)
- Clearly communicates and works with stakeholders at every level

## 3. Interaction Designer / User Researcher / Usability Tester

The Interaction Designer / User Researcher / Usability Tester is part of a highly collaborative, multi-disciplinary team focused on improving usability, user experience, and driving user adoption and engagement. They are responsible for conducting user research, analysis & synthesis, persona development, interaction design, and usability testing to create products that delight our customers.

Primarily responsible for:

- Conduct stakeholder interviews, user requirements analysis, task analysis, conceptual modeling, information architecture, interaction design, and usability testing
- Design and specify user interfaces and information architecture

- Lead participatory and iterative design activities, including observational studies, customer interviews, usability testing, and other forms of requirements discovery
- Produce user requirements specifications & experience goals, personas, storyboards, scenarios, flowcharts, design prototypes, and design specifications
- Effectively communicate research findings, conceptual ideas, detailed design, and design rationale and goals both verbally and visually
- Plan and facilitate collaborative critiques and analysis & synthesis working sessions
- Work closely with visual designers and development teams to ensure that customer goals are met and design specifications are delivered upon
- Designs and develops primarily internet/web pages and applications
- Develops proof-of-concepts and prototypes of easy-to-navigate user interfaces (UIs) that consists of web pages with graphics, icons, and color schemes that are visually appealing
- Researches user needs as well as potential system enhancements
- Has familiarity to, or may actually: code, test, debug documents, and implement web applications using a variety of platforms
- Planning, recruiting, and facilitating the usability testing of a system
- Analyzing and synthesizing the results of usability testing in order to provide recommendations for change to a system
- May create such artifacts as Usability Testing Plan, Testing Scripts, and Usability Testing Report

#### **4. Writer / Content Designer / Content Strategist**

Experience developing the strategy and execution of content across digital channels.

Primarily responsible for:

- Improves content creation efforts by helping to lead the research & development of interactive and experiential storytelling for projects
- Advise how to improve the ongoing iteration of content models
- Collaborate with designers and other content strategists to improve how the effectiveness of digital, print, and other content is measured
- Develop and maintain appropriate voice for produced content
- Advise how to streamline content production and management solutions and processes, based on user research
- Assign, edit, and produce content for products, services, and various projects
- Plan and facilitate content strategy workshops and brainstorming sessions on developing content and content services (including API development)
- Collaborate closely with developers and designers to create, test, and deploy effective content marketing experiences using the Agile method of software development
- Offer educated recommendations on how to deliver a consistent, sustainable and standards-driven execution of content strategy across products, services, and projects
- Collaborate with content managers, writers, information architects, interaction designers, developers, and content creators of all types
- Participate, as needed, on an Agile software development scrum teams

## 5. Visual Designer

The Visual Designer starts with a deep understanding of the goals of customers and the business so that they can create experiences that delight. Visual Designers will be well-versed in all aspects of current visual design standards and trends and will be responsible for managing project design reviews, resource planning, and execution for all project work related to visual design.

Primarily responsible for:

- Oversees all visual design efforts
- Guides, mentors, and coaches team members while leading projects to successful completion
- Develops and maintains relationships with key peers in Marketing, Branding, UX leaders, IT leaders, and others to identify and plan creative solutions
- Manages external service resources and budgets for visual design
- Ensures successful completion of all work executed by the team (on time, on budget, and ensuring quality)
- Ensures compliance with the project management methodologies and the Project Management Office processes and standards
- Develops, maintains, and ensures compliance of application release management, outage management and change control processes and standards
- Defines, creates, communicates, and manages resource plans and other required project documentation such as style guides and provides updates as necessary

## 6. Frontend Web Developer

Experience using modern, frontend web development tools, techniques, and methods for the creation and deployment of user-facing interfaces. Is comfortable working in an agile and lean environment to routinely deploy changes.

Primarily responsible for:

- Frontend web development using modern techniques and frameworks (e.g., HTML5, CSS3, CSS frameworks like LESS and SASS, Responsive Design, Bourbon, Twitter Bootstrap)
- JavaScript development using modern standards, including strict mode compliance, modularization techniques and tools, and frameworks and libraries (e.g., jQuery, MV\* frameworks such as Backbone.js and Ember.js, D3)
- Consuming RESTful APIs
- Using and working in team environments that use agile methodologies (e.g., Scrum, Lean)
- Use of version control systems, specifically Git and GitHub
- Ensuring Section 508 Compliance
- Quickly researching and learning new programming tools and techniques
- Using and working with open source solutions and community
- Creating web layouts from static images
- Creating views and templates in full-stack frameworks like Rails, Express, or Django

## 7. Backend Web Developer

Experience using modern, open source software to prototype and deploy backend web applications, including all aspects of server-side processing, data storage, and integration with frontend development.

Primarily responsible for:

- Web development using open-source web programming languages (e.g., Ruby, Python) and frameworks (e.g., Django, Rails)
- Developing and consuming web-based, RESTful APIs
- Using and working in team environments that use agile methodologies (e.g., Scrum, Lean)
- Authoring developer-friendly documentation (e.g., API documentation, deployment operations)
- Test-driven development
- Use of version control systems, specifically Git and GitHub
- Quickly researching and learning new programming tools and techniques
- Relational and non-relational database systems
- Scalable search technology (e.g. Elasticsearch, Solr)
- Handling large data sets and scaling their handling and storage
- Using and working with open source solutions and community
- Communicating technical concepts to a non-technical audience

## 8. DevOps Engineer

Experience serving as the engineer of complex technology implementations in a product-centric environment. Comfortable with bridging the gap between legacy development or operations teams and working toward a shared culture and vision. Works tirelessly to arm developers with the best tools and ensuring system uptime and performance.

Primarily responsible for:

- Deploying and configuring services using infrastructure as a service providers (e.g., Amazon Web Services, Microsoft Azure, Google Compute Engine, RackSpace/OpenStack)
- Configuring and managing Linux-based servers to serve a dynamic website
- Debugging cluster-based computing architectures
- Using scripting or basic programming skills to solve problems
- Installation and management of open source monitoring tools
- Configuration management tools (e.g., Puppet, Chef, Ansible, Salt)
- Architecture for continuous integration and deployment, and continuous monitoring
- Containerization technologies (e.g., LXC, Docker, Rocket)

## 9. Security Engineer

Experience serving as the security engineer of complex technology implementations in a product-centric environment. Comfortable with bridging the gap between legacy development or operations teams and working toward a shared culture and vision. Works tirelessly to ensure help developers create the most secure systems in the world while enhancing the privacy of all system users. Experience with white-hat hacking and fundamental computer science concepts strongly desired.

Primarily responsible for:

- Performing security audits, risk analysis, application-level vulnerability testing, and security code reviews
- Develop and implement technical solutions to help mitigate security vulnerabilities
- Conduct research to identify new attack vectors

## 10. Delivery Manager

Experience setting up teams for successful delivery by removing obstacles (or blockers to progress), constantly helping the team to become more self-organizing, and enabling the work the team does rather than impose how it's done.

Manages one or more agile projects, typically to deliver a specific product or transformation via a multi-disciplinary, high-skilled digital team. Adept at delivering complex digital projects, breaking down barriers to the team, and both planning at a higher level and getting into the detail to make things happen when needed.

Defines project needs and feeds these into the portfolio/program process to enable resources to be appropriately allocated.

Primarily responsible for:

- Delivering projects and products using the appropriate agile project management methodology, learning & iterating frequently
- Working with the Product Manager to define the roadmap for any given product and translating this into user stories
- Leading the collaborative, dynamic planning process – prioritizing the work that needs to be done against the capacity and capability of the team
- Matrix-managing a multi-disciplinary team
- Ensuring all products are built to an appropriate level of quality for the stage (alpha/beta/production)
- Actively and openly sharing knowledge of best practices



## 11. Agile Coach

Experience transforming initiatives to deliver lasting change within agencies that focus on delivering value for citizens. Coaches may be required to work either:

- at the team level, working with teams to ensure that delivery teams within agencies are adopting agile and performing effectively
- at the portfolio or program level, to help agencies to establish the right processes for managing a portfolio of work in an agile way
- at the organization level, to drive strategic change across the organization and ensure that adoption of agile techniques is embedded from the most senior levels of the organization
- or across all levels to ensure that organizations adopt a pragmatic approach to the way in which they govern delivery and continuous improvement of agile software development services

Primarily responsible for:

- Embed an agile culture using techniques from a wide range of agile and lean methodologies and frameworks, but be methodology agnostic
- Help to create an open and trust-based environment, which enables a focus on delivery and facilitates continuous improvement
- Assess the culture of a team or organization and delivery processes in place to identify improvements and facilitate these improvements with the right type of support
- Showcase relevant tools and techniques such as coaching, advising, workshops, and mentoring
- Engage with stakeholders at all levels of the organization
- Develop clear lines of escalation, in agreement with senior managers
- Ensure any stakeholder can easily find out an accurate and current project or program status, without disruption to delivery
- Work effectively with other suppliers and agencies
- Apply best tools and techniques to: team roles, behaviors, structure and culture, agile ceremonies and practices, knowledge transfer and sharing, program management, cross-team coordination, and overall governance of agile software development service delivery
- Ensure key metrics and requirements that support the team and delivery are well defined and maintained
- Equip staff with the ability to coach others
- If organization level, executive coaching on the fundamental considerations of agile software development service delivery design

## 12. Business Analyst

Familiar with a range of digital/web services and solutions, ideally where open source and cloud technologies and agile development methodologies have been applied. An eye for detail, excellent communication skills, ability to rationalize complex information to make it understandable for others to work, and ability to interrogate reported information and challenge sources where inconsistencies are found.

Primarily responsible for:

- Support agencies by analyzing propositions and assessing decision-making factors such as strategic alignment, cost/benefit, and risk
- Work closely with the Product Manager to define a product approach to meet the specified user need
- Define skill requirements and map internal, agency, and external (partners/specialist contractors) resources
- Work with the owning agency to ensure they have the budget to cover the proposed approach and resource requirements during delivery and analyze what provision they have for on-going running costs
- Analyze and map the risks of this product approach and propose mitigation solutions
- Define how the predicted user and financial benefit can be realized, and how channel shift will be measured
- Make a recommendation for action against the analysis done

### **13. Digital Performance Analyst**

Experience specifying, collecting, and presenting key performance data and analysis for a given digital service. Supports Product Managers by generating new and useful information and translating it into actions that will allow them to iteratively improve their service for users. Possesses analytical and problem-solving skills necessary for quickly developing recommendations based on the quantitative and qualitative evidence gathered via web analytics, financial data, and user feedback. Confident in explaining technical concepts to senior officials with limited technological background. And comfortable working with data, from gathering and analysis through to design and presentation.

Primarily responsible for:

- Support the Product Manager to make sure their service meets performance requirements
- Communicate service performance against key indicators to internal and external stakeholders
- Ensure high-quality analysis of agency transaction data
- Support the procurement of the necessary digital platforms to support automated and real-time collection and presentation of data
- Share examples of best practice in digital performance management
- Identify delivery obstacles to improving transactional performance in agencies and working with teams to overcome those obstacles

# **Attachment D**

## **CMAS Contract Application**

### **Information**

Attachment D - CMAS Contract Application Information provides general information related to the CMAS application process and contact information for questions regarding CMAS.

While a CMAS contract is not required to participate in the ADPQ vendor pool screening process, all vendors will be required to have a valid CMAS contract using a GSA Federal Supply Schedule 70 base contract prior to responding to ADPQ RFOs.

## **Attachment D**

### **CMAS Contract Application Information**

#### **1. Overview**

All vendors selected to participate in the ADPQ vendor pool will be required to have an approved CMAS contract using a GSA Federal Supply Schedule 70 base contract prior to responding to ADPQ RFOs. General information related to the CMAS application process is available at <http://www.dgs.ca.gov/pd/Programs/Leveraged/CMAS.aspx>.

Access to the GSA eLibrary is available at [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov).

#### **2. CMAS Contact Information**

Janna Welk  
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CMAS Division  
[Janna.Welk@dgs.ca.gov](mailto:Janna.Welk@dgs.ca.gov)  
916-375-4554

Michael Wong  
Department of General Services  
CMAS Division  
[Michael.Wong@dgs.ca.gov](mailto:Michael.Wong@dgs.ca.gov)  
916-441-9619

#### **3. CMAS Vendor Questions**

Vendors may submit questions regarding the CMAS application to the contacts listed in Section 2 – CMAS Contact Information. Each inquiry shall include the following information:

- a. RFI #75001, ADPQ CMAS Question(s) in the subject line of the email
- b. Vendor name and contact, phone number, and email address
- c. A description of the subject or issue in question

## **Attachment E**

### **ADPQ RFO Information**

Attachment E - ADPQ RFO Information provides information related to the ADPQ RFO maintenance process and ordering procedures as well as contact information for questions regarding ADPQ RFOs.

As part of ADPQ RFO process, vendors will not be required to submit a prototype or supporting technical approach artifacts that were created as part of the ADPQ vendor pool selection.

In preparing their offers, vendors will be required to have a valid CMAS contract that uses a GSA Federal Supply Schedule 70 base contract and be able to map the GSA Federal Supply Schedule 70 job titles associated to their CMAS contract to the ADPQ labor categories included in each ADPQ RFO.

## Attachment E

### ADPQ RFO Information

#### 1. Overview

After the initial ADPQ vendor pool has been established, CHHS departments will develop and release ADPQ RFOs to the pre-qualified vendors to deliver user-centered design and agile software development services. **As part of ADPQ RFO process, vendors will not be required to submit a prototype or supporting technical approach artifacts that were created as part of the ADPQ Vendor Pool selection.**

#### 2. ADPQ RFO Labor Categories

In developing the ADPQ RFOs, the State will include one or more of the labor categories listed in Attachment C - ADPQ Vendor Pool Labor Category Descriptions. In preparing their offers, vendors will be required to map the GSA Federal Supply Schedule 70 job titles associated to their CMAS contract to the ADPQ labor categories included in each ADPQ RFO. While all the ADPQ Vendor Pool Labor Categories may be essential, depending on the scope of a project, the following are the most common for agile software development projects:

- 1- Product Manager
- 6 - Front End Web Developer
- 7 - Backend Web Developer

#### 3. ADPQ RFO Maintenance

The State will be responsible for managing the ADPQ RFO process. This includes the following:

- Contacting ADPQ vendors and providing them with specific RFO documentation
- Assessing submitted ADPQ vendor offers
- Selecting and awarding to the winning ADPQ RFO vendor
- Contacting vendors to inform them of their submission results and status and providing debriefing upon request
- Terminating vendors, if required

#### 4. Irrevocable Offers (RFO Sample Language)

A vendor's final offer in response to this RFO # shall constitute a firm offer, which shall remain irrevocable for not less than 90 days following the scheduled date for Contract award specified in Section XX. In the event of a delay in Contract award, a vendor may extend the expiration date of its firm offer past XX days by written notice to the State pursuant to Section XX of the solicitation document [refer to Notices provision]. This expiration date may be further extended by mutual agreement between the State and the vendor in order to accommodate processing time for required approvals and other procurement delays. The State's execution of a contract under this RFO # shall not be considered a rejection of any unsuccessful vendor's firm offer, which such other firm offers shall remain irrevocable for the period described above. The State reserves the right,

upon termination of any Contract and without initiating a new RFO process, to accept any other vendor's firm offer and form a Contract with that other vendor. The State may continue to terminate and contract with any other vendors, as described above, until the expiration of all firm offers pursuant to this RFO #.

## **5. Contract Approval Criteria (RFO Sample Language)**

The State will assess each vendor's ADPQ offer using the following evaluation criteria:

- Existence in the ADPQ vendor pool
- Valid CMAS contract that uses a GSA Federal Supply Schedule 70 base contract
- CMAS job title mapping to ADPQ labor categories specified in the RFO
- RFO's Mandatory Qualifications
- Scoring criteria using an established threshold defined in the RFO
- Other assessment criteria in the RFO, as required

## **6. Contract Termination Criteria (RFO Sample Language)**

If, within 90 days of contract activation, the currently performing contractor under an RFO is deemed by the State, at its sole discretion, to be unacceptable in any way, the State may terminate the Contract with that contractor and accept the next highest scoring vendor's offer.

The State must submit to the terminating contractor a 15-day notice in writing which must include the reason(s) for this change. The State must allow the terminating contractor five (5) business days to respond in writing to the State's procurement office. The State, at its sole discretion, shall make the final decision to proceed with the substitution of vendors described in this Section XX. Following the State's decision, it will provide the terminating contractor with a Contract termination date. The terminated contractor will have 60 days after the Contract termination date to submit any remaining invoices for services rendered.

## **7. Contract Execution Criteria (RFO Sample Language)**

The State is required to contact the highest scoring vendor to ensure the vendor still has the resources/personnel available to provide the services stated in the original RFO. If not, the vendor will be allowed five (5) business days to provide documentation to the State's procurement office detailing the replacement resources/personnel. Upon State approval of the proposed replacement resources/personnel, the selected vendor will be notified in writing and given a start date.

If unable to provide a replacement, the next highest scoring vendor, if available, will be contacted and given the opportunity to be awarded. Upon depletion of available vendors, the RFO will be required to be re-released to the ADPQ vendor pool.

## **8. ADPQ RFO Contact Information**

Amy Cooper  
Office of Systems Integrations  
Acquisition and Contracting Services Division  
[Amy.Cooper@osi.ca.gov](mailto:Amy.Cooper@osi.ca.gov)  
916-263-3264

## **9. ADPQ RFO Questions**

Vendors must submit questions regarding ADPQ RFOs, via email, to the contact listed in Section 8 – ADPQ RFO Contact Information. Each inquiry shall include the following information:

- a. RFI #75001, ADPQ RFO Question(s) in the subject line of the email
- b. Vendor name and contact, phone number, and email address.
- c. A description of the subject or issue in question, or discrepancy found.
- d. RFI section, page number, or other information useful in identifying the specific problem or issue stated in the in question.