REQUEST FOR OFFER

RFO #: 16RFO004

Consultant for CASE and CTC Online Support and Training

Master Services Agreement Information Technology Consultant Services

MSA# 5137002-001 to 160; 5137002-162 to 167

Offer Deadline
June 29, 2017 4:00 p.m.

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

Read the attached document carefully. The RFO response due date is June 29, 2017 at 4:00 p.m. Responses to this RFO and any required copies must be mailed, delivered by carrier or hand delivered, and must be clearly labeled to the department contact noted below.

Adrienne Trapnell
Commission on Teacher Credentialing
Fiscal and Business Services
1900 Capitol Ave., Sacramento, CA 95811-4213
(916) 322-8146, Contracts@ctc.ca.gov

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REQUEST FOR OFFER

I. General Information

I.1. Background and Purpose of the RFO

The purpose of the RFO is to procure an IT Master Service Agreement (ITMSA) qualified Siebel application development contractor to provide the Commission on Teacher Credentialing (the Commission) with system enhancements and training for the CTC Online web-based system and the Credentialing Automation System Enterprise (CASE) system.

The Commission seeks the services of a qualified Siebel Application Development Contractor to make system enhancements to CASE and CTC Online to make enhancements to CTC Online to improve user friendliness, make security enhancements and make other miscellaneous system enhancements to both CASE and CTC Online. The Contractor must have expertise in the Siebel Call Center (CASE) and eSales (CTC Online) modules for the CASE and CTC Online enhancements using Open User Interface (UI). The contractor must also have experience training IT technical staff on Siebel.

Key Action Dates and Times
It must be understood that time is always of the essence, both for the RFO submittal and contract completion. Offerors are advised of the key dates and times shown below and are expected to adhere to them.

Table 1: Key Action Dates

EVENT	DATE/TIME
1. Release of RFO	6/22/2017
2. RFO Response Submission Due	6/29/2017, 4:00 PM, PDT
3. Commission Review of RFO Submissions	6/30-7/3, 2017
4. Reference Contact	7/3-7/5, 2017
5. Anticipated Agreement Award	7/5/17

All dates after the RFO submission are approximate and shall be adjusted as conditions indicate, without addendum to this RFO.

I.2. Questions

If an Offeror discovers any ambiguity, conflict, discrepancy, omission or any other errors in this RFO, the Offeror should immediately provide written notice to the Commission of such error and request clarification or modification of the affected document. Offerors requiring clarification of the intent and content of this RFO may request clarification by submitting questions electronically to the Procurement Official listed on the cover page of this RFO no later than the date identified in RFO Section I.2, Table 1 - Key Action dates.

Include the following when submitting questions:

- Offeror name, name of firm, telephone number, e-mail address

- RFO section, page number, or other information useful in identifying the specific problem or issue in question (e.g. paragraph, bullet #, etc.)
- A description of the subject or issue in question, or discrepancy found

I.3. Addenda

The Commission may modify any part of the RFO, prior to the date Responses are due, by issuance of one (1) or more addenda. Addenda will be numbered consecutively and will be posted on CaleProcure, the Department of General Services' procurement web application.

I.4. Cost of Responding

All costs for developing Responses are entirely the responsibility of the Offeror and shall not be chargeable to the Commission.

I.5. RFO Response Requirements

This RFO and the Offeror's response to this document will be made part of the ordering department's STD.213IT Contract and procurement contract file.

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 necessary information for the Commission to evaluate the response, verify requested information and determine the Offeror's ability to perform the tasks and activities defined in:

- Attachment A – Statement of Work
- Attachment B – Offeror's Qualifications
- Attachment C – Project Team Qualifications
- Attachment D – MSA Classification Qualifications
- Attachment E – Offeror References
- Attachment F – Cost

The Offeror must submit one (1) master copy (clearly marked "Master") and two (2) copies (clearly marked "Copy"), plus one (1) electronic PDF version or their response on CD/DVD or flash drive to the department contact name and address contained on the cover sheet to this RFO no later than the date and time specified in Table 1: Key Action Dates. Hard copies of the response must be bound.

I.6. RFO Response Content

The majority of the information required to respond to this RFO is contained in the Attachment A – Scope of Work, Attachment B – Offeror Qualifications, Attachment C – Project Team Qualifications, Attachment D – MSA Classification Qualification, Attachment E – Offeror References, Attachment F – Costs.

I.6.1. Response to Attachment A – Scope of Work

The Offeror's "Statement of Work" must respond to the Commission's Statement of Work and will be used to evaluate responsiveness to requirements. The response must include any additional information that the Offeror deems necessary to explain how the Offeror intends to meet the Commission's requirements.

The Statement of Work needs to contain the following as appropriate:

1. Cover Letter with the following identification and contact information
    - Company name, mailing address and telephone number
    - Name and e-mail address of contact person
    - IT MSA contract number

   A duly authorized representative of the Offeror shall sign the proposal certifying that the proposal is a valid and binding offer and that he/she is authorized to sign the proposal. In addition, by signing and submitting this cover letter, the Offeror agrees to provide the required documents listed in Attachment A, Section A.14.1, upon request by the Commission either prior to or upon award of the agreement as noted.
2. Overview of the required tasks and outcomes
3. Description of a recommended approach for improving the user friendliness of CTC Online, and experience in solving issues on Siebel Open UI IP16 or IP17 systems.
4. Detailed descriptions of work from projects cited as a reference in response to Attachment E
5. Organization chart that identifies the proposed project team
6. Resumes for each identified member of the project team, detailing experience meeting the Commission's requirements,
7. Any other requirements shown in the Statement of Work document.

I.6.2. Response to Attachment B – Offeror Qualifications

This is a consulting services contract requiring technical expertise in Siebel application development and modification of Siebel Call Center and eSales, and system and internet security and user authentication. The Offeror must meet the Mandatory Minimum Qualifications listed in Attachment B – Offeror Qualifications to be considered for award.

Offeror Qualifications – Mandatory: Offerors must document meeting the following requirements.

- Must have completed at least three (3) contracts on projects within the past five (5) years with primary responsibility, size and scope comparable to the business need identified in this RFO
- Must propose a project team that includes the minimum qualifications outlined in RFO Section 1.8.3 and Attachment C – Project Team Qualifications

I.6.3. Response to Attachment C – Project Team Qualifications

Attachment C – Project Team Qualifications contains the mandatory qualifications that must be met by the Offeror's proposed team. Attachment C must be completed in its entirety and must clearly provide a description of how each proposed individual contributes to the Project Team's mandatory qualifications. The Offeror will be evaluated on expertise and experience stated in the required staff resumes listed in the mandatory minimum qualifications.

Offeror Project Team Qualifications – Mandatory: Offeror must document that Offeror's proposed Project team meets the following mandatory qualifications:

- All team members shall meet MSA Job Classification and Staff Experience Requirements. All work must be completed on site at the Commission's facility.
- All Developers:
    - Shall have passed the Siebel 8.0 or 8.1 Core Consultant Certification exam (Offeror must provide documentation)
    - Shall have a minimum of three (3) years of experience working in Siebel Enterprise CRM systems
    - Shall have extensive working knowledge using Open UI with a minimum of (2) years of experience
    - Shall have a minimum of three (3) years of experience in Siebel application development, eScript, EIM and PL/SQL.
    - Shall have a minimum of one (1) year experience developing Siebel Standard Interactivity applications
    - Shall have completed a minimum of two (2) development projects using Siebel 8.1.1.10 or above, with at least one project for developing Siebel Standard Interactivity applications
    - Shall have working knowledge of Siebel Navigation
    - Shall have experience at a customer site developing in the Open UI framework on IP16 or IP17
    - Shall have experience training and mentoring IT Technical staff on how to support and enhance Siebel Enterprise CRM systems.

I.6.4. Response to Attachment D – MSA Classification Qualifications

Offeror must document that Offeror's proposed team meets the experience and education requirements for their designated classification as listed in the MSA by completing Attachment D – MSA Classification Qualifications. The classification qualifications will be assessed on a Pass/Fail basis. Vendors must pass all pass/fail items to qualify for scoring items.

I.6.5. Response to Attachment E – Offeror References

Offeror must complete Attachment E – Offeror References for services performed within the last five (5) years that are similar to the scope of work to be performed in this contract. Offeror's references may be contacted during the evaluation phase of this procurement and reference responses scored.

The Commission will make two attempts to contact the reference with the information provided during Commission business hours of 9 AM – 5 PM Pacific Time. If the reference cannot be reached by the second attempted contact, the Offeror will receive no evaluation points for that reference.

I.6.6. Response to Attachment F – Costs

Offeror must complete Attachment F - Costs. This Attachment details the staff hours by classification and hourly rate per classification. See required format in Attachment F – Costs.

- Offeror must identify the staff ITMSA job classification and hourly rate for Siebel Senior Developers for a total of one thousand and five hundred (750) hours and the contract cannot exceed $100,000.

I.6.7. Copy of Current ITMSA Agreement

Offeror must include a copy of the Department of General Services (DGS) Information Technology Master Services Agreement (MSA) and all supplements and attachments, including job classification, experience requirements, education requirements and approved hourly rates.

II. Review of Offers for Award

Responses to this RFO will first be reviewed for responsiveness to all requirements of Attachments A through F. If an Offeror's response is missing information required in any of the Attachments, the response may be deemed non-responsive. Further review is subject to the Commission's discretion.

Award of a contract resulting from this RFO will be based on a best value method that includes cost as a substantial factor in the selection process.

The Commission will review responses in accordance with the criteria identified below. The corresponding points shall be used to determine the winning offer.

The Review Process will consist of four parts:

- **Review of Mandatory Requirements** – Offeror's response will be evaluated to determine if all Mandatory requirements (Pass/Fail) have been met. An Offeror's response receiving a score of "Fail" for any mandatory requirement will be deemed non-responsive and will result in Offeror disqualification.
- **Review of Offeror Qualifications, Project Team Qualifications and Technical Approach** – Offeror's response will be assessed for its technical competency based on the qualifications of the Offeror, Offeror's Project Team and Offeror's Approach. Responses achieving the highest scores will advance to Review of References.
- **Review of References**– During this step of the review, Offeror's references will be contacted and scored.
- **Review of Costs –** The "Best Value" calculation shall be used as follows:

  Lowest Offer/Offeror's Offer X Maximum Cost Points = Offeror's Cost Score

The following table is a summary of the relative importance of each part of the assessment.

Table 2: Relative importance of each part of the response assessment

Administrative Criteria	
Item	**Weight**
Attachment B, Offeror Qualifications (mandatory) met	Pass/Fail
Attachment C, Project Team Qualifications (mandatory) met	Pass/Fail
Attachment D, MSA Classification Qualification	Pass/Fail

Attachment E, Offeror References provided	Pass/Fail	
Technical Approach and other Scorable Elements		
Item	**Weight**	**Maximum Points**
Technical Approach (Offeror's Response to RFO Section I.7.1)	10%	100
Offeror Qualifications (Offeror's Response to Attachment B)	10%	100
Project Team Qualifications (Offeror's Response to Attachments C And D, and Project Team Resumes)	30%	300
References		
Item	**Weight**	**Maximum Points**
References	20%	200
Item	**Weight**	
Cost	30%	300
Total	100%	1000

ATTACHMENT A - SCOPE OF WORK

A.1. SCOPE AND DESCRIPTION

This Statement of Work (SOW) describes the services to be provided on a time and materials basis by the approved vendor, hereinafter referred to as "Offeror," to develop, test and deploy system enhancements for improving user friendliness to the Commission's CASE and CTC Online systems that utilize Siebel Call Center and Siebel eSales Customer Relationship Management applications. Also, include your methodology on how you will be training and mentoring IT Technical staff on how to support and enhance Siebel Enterprise CRM systems.

A.2. CONTRACT PERIOD

The proposed contract term is from the awarding of the contract through December 31, 2017.

Offerors are cautioned that no work shall begin until the contract has been fully executed. If work is performed prior to contract approval, all previous work performed by the Offeror is considered donated to the Commission and no payment shall be made for that work.

A.3. CURRENT ENVIRONMENT

A.3.1. Overview

Currently both CASE and CTC Online use Oracle's Siebel CRM systems as a front end to the Oracle database. While Siebel has been a great tool for creating interfaces that work in real time with the Commission's Oracle data, it is somewhat difficult for both internal staff and end users to use. This leads to frustration for the end users, less reliable data accuracy and increased staff time. To gather additional data for accreditation, the interface with the applicant needs to be intuitive and user friendly. If the user gives up on the electronic application process, the Commission may receive more paper applications, increasing the work requiring manual handling and data entry by Commission staff. The current internal data systems and the public facing data entry system will need to be modified to use current technology that is more efficient, user friendly, and with a self-guided strategy in mind all using Siebel Open UI.

A.3.2. Existing Infrastructure

Figure 1 below depicts the current network and equipment environment.

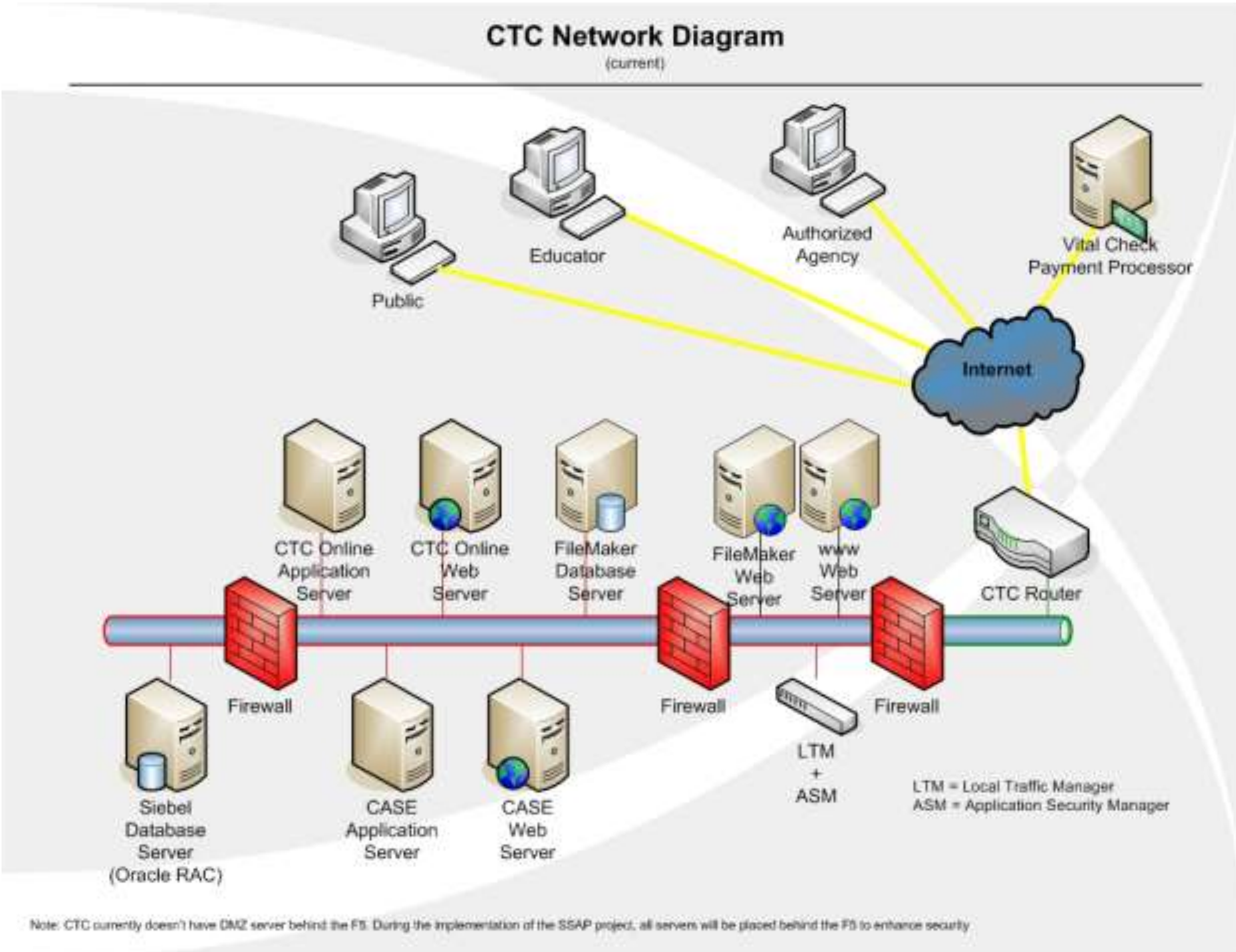

Figure 1: Commission's Current Network and Equipment Environment

- **Desktop workstations** – HP workstation; laptops and desktops; Microsoft Surface Pro 3
- **DATA source servers** - Oracle database server – physical server running on Oracle Linux OS. Oracle Database. All servers are blade servers with Oracle database stored on SAN.
- **Network protocols** – Oracle SQLnet. ODBC compliant as well.
- **Application development software** – Oracle – Oracle SQL developer, Toad by Quest.
- **Personal productivity software**
    - Microsoft Office or compatible Office document viewer
    - Adobe Reader or compatible PDF viewer
- **Operating System Software** – Windows
- **Database management software** –Oracle DBMS
- **Web broadcasting system** – Windows Server, Accordant
- **Application software** – Siebel application framework and Siebel eSales

- **Reporting software –** Crystal Reports, Oracle BI

The primary systems used by the Commission are CASE and CTC Online, described as follows:

- **Credentialing Automation System Enterprise (CASE)** is the Commission's automation system that collects and houses all of the credential, exam and discipline data. The CASE system was built on an Oracle database with a Siebel Customer Relationship Management (CRM) system's Call Center module.
- **CTC Online** is a web-based system built using Siebel e-Sales and directly accesses the data in CASE in real time. CTC Online allows the following:
    - The public to search for the credentials, certificates and/or permits held by public school teachers and educators; it also allows employers, authorized agencies, and applicants to do a secured search to verify Credentials held by an educator.
    - Educators to submit applications online, check the status of any pending application, complete recommendations from program sponsors and renew and print documents or credentials.
    - Employers and Commission-approved educator preparation entities to access the CTC Online system and make recommendations for credentials based upon completion of a Commission-approved educator preparation program or 30-Day Substitute Permits by Authorized Agencies.

A.4. FUTURE ENVIRONMENT

A.4.1. Overview

The scope of work for this RFO focuses on CASE and CTC Online enhancements to improve user friendliness and solve issues that come up from the recent upgrade to Open UI and upgrading to IP16.

A.4.2. Improve User-friendliness of CTC Online

The Commission would like to enhance the existing credential data system to improve the user interface and streamline the process for completing online credential applications to capture a higher quality of data.

Currently, 75% of all applications for Credentials, Permits and Certificates are completed through the Commission's Public Facing Online Application system CTC Online. The system was built with a strong foundation and meets the needs of the customers; however, the Commission has received numerous complaints about how "User Unfriendly" and how confusing the application process is. Some users give up and send in paper applications because of the difficulty of the system.

Since the system was built, newer technology has been released that can streamline and provide users with a self-guided strategy when completing the online application process. With a simple and more straightforward experience, the system enhancements will produce a higher quality of data that is required for the data dashboard in order for it to be successful.

A.5. CONTRACTOR TASKS AND RESPONSIBILITIES

A.5.1. Overview

The Contractor is charged with development and testing of enhancements for CTC Online user friendliness enhancements, and other CASE and CTC Online enhancements as needed. All work must be completed on site at the Commission's facility. The Contractor's role on this project shall include all tasks and activities described in this RFO, including:

- Support the maintenance of a project work plan and schedule for completing the enhancements and tasks being executed per each work authorization
- Complete development and testing of user friendliness enhancements as well as other enhancements, plus other tasks that may be requested by the Commission, per the priority assigned by the Commission and based on the scope of work defined within each work authorization
- Assign individual or multiple project staff to each work authorization, depending upon the complexity of the enhancement or task and the timeframe for completion (there may be different enhancements or task being worked on concurrently by different team members)
- Complete tasks in the timeframe that will be estimated and agreed upon in each work authorization
- Provide input to the Commission's configuration management processes for the development and test systems
- Conduct meetings and gather requirements with Subject Matter Experts (SME), fact-finding meetings, working sessions, status reporting (both verbal and written), presentations, and general communication on an ongoing basis
- Work with the Commission's Project Manager to ensure any issues concerning the work are reported and resolved
- Comply with all applicable State and Commission policies, procedures and standards, including State and Federal privacy laws, to ensure maximum protection of privacy
- Participate in project management and System Development Life Cycle (SDLC) management processes such as risk and issue management, change control, release management, organizational change management, etc.
- Work closely with CTC IT technical staff on any changes, so that they are trained and mentored to support and enhance Siebel Enterprise CRM systems in the future.

A.5.2. Work Authorizations

For each enhancement or task requested by the Commission, the Contractor and the Commission will collaboratively develop a work authorization that will detail the purpose, objectives, and scope of work to be undertaken by the Contractor (see example Work Authorization form Attachment G). The Contractor shall estimate the number of development and testing hours needed to complete the scope of work for the work authorization. Both the

Commission and the Contractor shall mutually agree upon the scope and the estimate of hours, and both sign the work authorization, prior to any work being started by the Contractor.

If, in the performance of the work, the Contractor determines that a work authorization to be performed under this Contract cannot be accomplished within the estimated work hours, the Contractor shall immediately notify the Commission in writing of the Contractor's estimate of the work hours which will be required to complete the work authorization in full. Upon receipt of such notification, the Commission may:

a) Authorize the Contractor to expend the estimated additional work hours or services in excess of the original estimate necessary to accomplish the work authorization.

b) Terminate the work authorization. Or,

c) Alter the scope of the work authorization in order to define tasks that can be accomplished within the remaining estimated work hours.

The Commission will notify the Contractor in writing of its decision within seven (7) business days after receipt of the notification. If notice of the decision is given to proceed, the Contractor may expend the estimated additional work hours or services. The Commission agrees to reimburse the Contractor for such additional approved work hours.

A.6. SUBCONTRACTORS

The Offeror shall act as the prime Contractor under the contract. In addition to identifying all personnel proposed to work under this contract, the Offeror shall also identify their subcontractor affiliation as applicable. All subcontractors must be identified by firm name, address, contact person and address. Subcontractors are subject to all the terms, conditions and requirements of this subsequent contract.

Advance notification of a contemplated subcontractor change, the reasons for such change and a subcontractor transition plan shall be provided to the Commission no less than fourteen (14) calendar days before the termination on an existing subcontractor. The Commission shall approve any changes to the subcontractor(s) before the termination of the existing subcontractor(s) and hire of a new subcontractor(s). All subcontractor(s) presented by the Offeror for consideration shall be subject to all terms, conditions and requirements of this subsequent contract. Reference checks shall result in a positive reference and demonstrate a strong probability of successful performance on this project as determined by the Commission.

A.7. CONTRACTOR PERSONNEL

The Contractor shall not add and/or substitute personnel without the prior written consent of the Commission, which consent shall not be unreasonably withheld. Time is of the essence; therefore, the Contractor shall make every reasonable effort to provide suitable substitute personnel promptly. The additional and/or substitute personnel shall meet all the requirements and shall be approved in writing by the Commission prior to substitute personnel beginning work.

The Contractor shall submit an Add, Delete or Substitute Personnel Request Form, Attachment H, and the résumé of the additional and/or a suitable replacement that meets or exceeds all staff requirements as set forth in Section 1.8.3 of this RFO to Project Director or his or her designee for review and approval within (ten) 10 business days after receipt of the Add, Delete or Substitute Personnel Request Form and resume. Rejection of personnel who do not meet the same criteria as the original personnel is at the Commission's discretion.

A.8. FINGERPRINT CLEARANCE

All staff on this project shall receive fingerprint clearance prior to any work being initiated.

A.9. TRAVEL

All work shall be performed on site at 1900 Capitol Avenue, Sacramento, CA 95811 between the hours of 8:00 a.m. and 5:00 p.m. Pacific Time. Travel shall not be reimbursed by the Commission.

A.10. COMMISSION RESPONSIBILITIES

The Commission shall provide workstations, telephones, and access to business and technical documents as necessary for the Offeror to complete the tasks identified in the Commission's purchase document.

A.11. ACCEPTANCE CRITERIA

It shall be the Commission's sole determination as to whether an enhancement or task(s) outlined in a work authorization has been successfully completed and is acceptable to the Commission. There shall be a signed acceptance document associated with each work authorization before invoices can be processed for payment.

Acceptance criteria shall consist of test criteria defined by the Commission, which must be met in order for the enhancement or miscellaneous task to be accepted. If an enhancement or task outlined in a work authorization is not accepted, the Commission shall provide the reason in writing upon completion of acceptance testing period.

A.12. FAILURE TO PERFORM

Contractor assumes all liability for performance of this contract and all subcontracts executed pursuant to or funded by this Contract.

Further, the Contractor assumes full liability for and agrees to reimburse the Commission for Contractor's or any of Offeror's subcontractor's failure to comply with any term or condition of the Contract. Contractor shall assure that subcontracts are administered in accordance with the Contract, with any rules and regulations and with any amendments thereto. Contractor agrees that the Commission or its designated agent has full recourse against the Contractor for the failure to provide acceptable deliverables (completion of enhancements or tasks), milestones and status reports on time shall subject Contractor to possible delay of payment and/or the Commission pursuing remedies under the Contract in accordance with the General Provisions.

A.13. INVOICING AND PAYMENT

The Commission agrees to compensate the Contractor in accordance with the prices for hourly rates for Services specified in the Contract.

Invoices shall be submitted on company letterhead and shall clearly state the work performed, the name and classification of the personnel who performed the work.

California Commission on Teacher Credentialing
Attn: Account Liaison
1900 Capitol Avenue
Sacramento, CA 95811

A.14. DOCUMENTATION REQUIRED PRIOR TO/OR UPON AWARD

A.14.1. Form 700 Statement of Economic Interests

Each member of Offeror's proposed Project Team must complete and submit Form 700 Statement of Economic Interests upon award of this contract.
http://www.fppc.ca.gov/forms/700-14-15/Form700-14-15.pdf

A.14.2. Conflict of Interest and Confidentiality Statement

Each member of Offeror's proposed Project Team must complete and submit a Conflict of Interest and Confidentiality Statement (Exhibit 3) upon award of this contract.

ATTACHMENT B - OFFEROR QUALIFICATIONS (FIRM)

Firm Name:				
Q#	**Mandatory Qualifications (MQ)**	**Project Description** Workplace, Project Name, Contract Value # of End Users Time Period *(month/year start and end dates)*	**Relevant Experience Description** Firm's role, description of relevant experience on the Project(s).	**Reference Contact** Contact Name, Company Name, Telephone Number, Email, Work Relation
1.	Must have completed at least three (3) contracts on projects within the past five (5) years with primary responsibility, size and scope comparable to the business need identified in this RFO.	1.		
		2.		
		3.		

ATTACHMENT C - PROJECT TEAM QUALIFICATIONS

Complete one matrix for each proposed team member. Offeror may add additional rows as necessary.
OFFEROR MUST ATTACH EVIDENCE OF CERTIFICATION OR DOCUMENTATION OF HAVING PASSED SIEBEL 8.0 OR 8.1 CORE CONSULTANT CERTIFICATION EXAM FOR EACH PROPOSED TEAM MEMBER.

Name:				
MQ #	**Mandatory Qualifications (MQ)**	**Project Description** Workplace, Project Name, Time Period *(month/day/year start and end dates), % of time*	**Relevant Experience Description** Individual's role, description of the relevant experience on the project(s)	**Reference Contact** Contact Name, Company Name, Telephone Number, Email, Work Relation (references may be contacted to verify information provided)
1.	Minimum of three (3) years of experience working in Siebel Enterprise CRM systems	a.	a.	a.
		b.	b.	b.
2.	Shall have extensive working knowledge using Open UI with a minimum of (2) years of experience			
3.	Minimum of three (3) years of experience in Siebel application development, eScript, EIM and PL/SQL.	a.	a.	a.
		b.	b.	b.
4.	Minimum of one (1) year experience developing Siebel Standard Interactivity applications.	a.	a.	a.
		b.	b.	b.
5.	Minimum of two (2) development projects using	a.	a.	a.

Name:				
MQ #	**Mandatory Qualifications (MQ)**	**Project Description** Workplace, Project Name, Time Period *(month/day/year start and end dates), % of time*	**Relevant Experience Description** Individual's role, description of the relevant experience on the project(s)	**Reference Contact** Contact Name, Company Name, Telephone Number, Email, Work Relation (references may be contacted to verify information provided)
	Siebel 8.1.1.10 or above, with at least one project for developing Siebel Standard Interactivity applications	b.	b.	b.
6.	Working knowledge of Siebel Navigation	a.	a.	a.
		b.	b.	b.
7.	Shall have experience at a customer site developing in the Open UI framework on IP16 or IP17			
8.	Shall have experience training and mentoring IT Technical staff on how to support and enhance Siebel Enterprise CRM systems.			
9.	Evidence of certification or documentation of having passed Siebel 8.0 or 8.1 core consultant certification exam attached?	Yes______ No ______	Describe Attachment	

ATTACHMENT D - MSA CLASSIFICATION QUALIFICATIONS

EXAMPLE ONLY

(a) Proposed Individual's Name	(b) MSA Classification	(c) MSA Job Classification Experience Requirement (from MSA)	(d) Description of Experience that Satisfies the Classification Requirements with Reference name, email, phone #	(e) MSA Classification Education Requirement (from MSA)	(f) Description of Education that satisfies the Classification
John Smith	*Senior Technical Lead*	*Experience: This classification shall have a minimum of seven (7) years of experience in projects. At least four (4) years of that experience shall have been in a lead capacity.*	*From 01/01/1997 thru 06/30/2000 (3.5 years, all in a lead capacity), Mr. Smith worked for Company ABC and served in a lead capacity as the Senior Technical Lead on the XYZ IT Project for the Department of Motor Vehicles. Duties included…… Reference: Jim Dar, 209-244-1294, jim.dar@dmv.ca.gov* *From 07/01/1993 thru 12/1996 (3.5 years, 6 months in a lead capacity), Mr. Smith worked for Company RST and served as the Technical Lead and Senior Technical Lead on the UVW IT Project for the State Controller's Office. Duties included….. Reference: Pat Rex, 916-747-9876, pat.rex@sco.ca.gov*	*Education: This classification requires the possession of a bachelor's or equivalent university degree.*	*Bachelor's Degree in Computer Science for John Smith is attached*

ATTACHMENT D
MSA CLASSIFICATION QUALIFICATIONS

(a) Proposed Individual's Name	(b) MSA Classification	(c) MSA Job Classification Experience Requirement (from MSA)	(d) Description of Experience that Satisfies the Classification Requirements with Reference name, email, phone #	(e) MSA Classification Education Requirement (from MSA)	(f) Description of Individual's Education that satisfies the Classification

ATTACHMENT E - OFFEROR REFERENCES

Submission of this attachment is mandatory. Failure to complete and return this attachment with your proposal shall cause your proposal to be rejected and deemed nonresponsive.

List below three (3) references for services performed within the last five (5) years, which are similar to the scope of work to be performed in this contract. If three references are not provided, Offeror's response may be deemed non-responsive.

References will be contacted during the dates identified in RFO Section I.2. CTC will make three attempts to contact the reference with the information provided during CTC business hours of 9 AM – 5 PM PT. If the reference cannot be reached by the third attempted contact, the Offeror will receive no evaluation points for that reference.

REFERENCE 1			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			
REFERENCE 2			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			
REFERENCE 3			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person		Telephone Number	
Dates of Service		Value or Cost of Service	
Brief Description of Service Provided			

ATTACHMENT F - COST WORKSHEET

Contractor agrees to furnish all labor necessary to perform assigned tasks or services in accordance with Attachment A – Scope of Work.

Unless otherwise specified by the Commission and agreed to by Contractor, the rates set forth shall remain in force for the term of the contract and shall include cost of insurance and every other item of expense, direct and indirect, if applicable. The hours proposed for consultants are an estimate and the actual hours worked shall be approved by the Commission via work authorizations prior to performance of assigned tasks or services.

Consultant services shall be reimbursed on a time and materials basis subject to completion of approved tasks assigned by the Commission via the work authorizations. Contractor shall provide consultants timesheets with each invoice specifying work completed by each consultant, number of hours performed, and any outstanding issues and/or concerns that need to be addressed.

The total amount shall not exceed $100,000. The total number of hours proposed must be 750.

The total hours given in this RFO are for offer comparison purposes only and total hours are not a guarantee of hours to be worked under this contract. Upon award, the final hours and contract amount will be determined based on the contract budget and the hourly rate(s) for the staff person(s) proposed by the Offeror.

The hourly rates cannot exceed the hourly rates from the MSA contract.

Contractor Name:				
Proposed Staff Name	**MSA Classification**	**Hourly Rate**	**Hours**	**Extended Total**
Total			**750**	

ATTACHMENT G - WORK AUTHORIZATION

EXAMPLE

TITLE: 70/752 Output Formatter

Task Summary:
Develop program to format and print simulated 70/752 displays using a sequential data set as input.

Schedule Dates:

Start Date:	[month/day/year]
Completion Date:	[month/day/year]

Estimated Labor-Hours	Labor Hour Rate	Estimated Total Cost
100	$90.00	$9,000.00

Contractor Personnel To be Assigned	Classification
Jane Doe	Staff Programmer Analyst

Completion Criteria:
Acceptance of program by the Commission.

This task will be performed in accordance with this Work Authorization and the provisions of Agreement No. _______________.

Approval:

___________________________________	
Contractor Representative (Print)	Commission Representative (Print)
___________________________________	
Contractor Representative Signature	Commission Representative Signature
___________________________________	
Date Signed	Date Signed

ATTACHMENT H - ADD, DELETE OR SUBSTITUTE CONTRACTOR PERSONNEL REQUEST FORM

ATTACHMENT H
Add, Delete or Substitute
Contractor Personnel Request Form

Contractor Name	**Contractor Phone No.**	**Date**
ITMSA Number	**Project Name/Agreement Number**	

Personnel To Be Added	**Personnel Replaced**	**Proposed Effective Date**	**Classification**	**Resume Meets MQs and ITMSA requirements**
				☐
				☐
				☐
				☐

Personnel To Be Deleted	**Date Effective**	**Reason**
		Reason:
		Reason:
		Reason:
		Reason:

Comments/Special Instructions

Please note:

The changes as indicated in this request are being made at no additional cost to the Commission. – Sample

(*Include this language, if applicable).*

STATE Acceptance	**Contractor Acceptance**
Division/Project	**Contractor** (If other than an individual, state whether a corporation, partnership, etc.)
By (Authorized Signature)	**By (Authorized Signature)**
Printed Name of Person Signing	**Printed Name of Person Signing**
Title	**Title**