



September 4, 2007

Subject: ADDENDUM #1 to OSI RFP #17700 – CWS/CMS M&O Project Management Support

To: ALL INTERESTED BIDDERS

The State of California is issuing an Addendum #1 for the mentioned above RFP to remove and replace pages that include clarifications and changes.

RFP Section	Sub-Section	Action
6.6.1. Contractor Task Reporting and Management	6.6.1.4 Monthly Status Report	<ul style="list-style-type: none"> ▪ Remove and replace Page 45 ▪ Change Exhibit Q to Exhibit R (Sixth Bullet)
Table 2. Deliverables Completion Schedule	6.6.2.3 Transition In Services	<ul style="list-style-type: none"> ▪ Remove and replace Page 50 ▪ Changed Due 20 State Work days to Due within 30 Calendar days
6.8.3 Project Management Support Staff Experience	6.8.3.1	<ul style="list-style-type: none"> ▪ Remove and replace Page 53 ▪ Changed to read, "Staff assigned must be certified as PMP."
Table 3. Team Skill Cross Reference	Item 4. Item 5.	<ul style="list-style-type: none"> ▪ Remove and replace Pages 55 ▪ Added the following: "Minimum of two (2) FTE years experience..." ▪ Added the following language: "Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures."
8.2 Proposal Items by Volumes	8.2.1 Volume 1	<ul style="list-style-type: none"> ▪ Remove and replace Pages 58 and 59. ▪ Deleted "Past Experience Summary" ▪ Moved "Small Business Status" to page 59, next to Small Business Preference (optional). ▪ Renumber Volume 3 (Completed and Signed Contract (STD. Form 213) to Volume 2 and Volume 2 (Response to Technical Requirements) to Volume 3

RFP Section	Sub-Section	Action
9. Proposal Evaluation	9.2 Staff Experience: Pass/Fail Item 4. Item 5.	<ul style="list-style-type: none"> <li data-bbox="738 226 1442 283">▪ Remove and replace Pages 63 <li data-bbox="738 315 1442 388">▪ Added the following: "Minimum of two (2) FTE years experience..." <li data-bbox="738 409 1442 501">▪ Added the following language: "Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures."

All other terms and conditions shall remain the same. The State appreciates all the time and effort bidders have spent in preparing their proposal response and looks forward to final proposal responses. If you have questions regarding this addendum, please contact me.

Sincerely,

Original Signature on File

Tom Abeyta
 Procurement Official
 DGS, Procurement Division
 (916) 375-4491

6.6 Task Requirements

6.6.1 Contractor Task Reporting and Management

The objective of this task is to implement PMS services successfully by meeting the business requirements and completing project milestones, including those activities required to plan and control the scope, schedule, staffing, and budget of all services provided in this SOW.

6.6.1.1 Task Accomplishment Plan (TAP)

The contractor shall develop and deliver a Task Accomplishment Plan (TAP) for the activities in this SOW through the projected contract end date. The TAP documents the planned monthly expenditures, and will be revised whenever there is a change in pricing or spending plans.

6.6.1.2 Detailed Project Management Plan

The contractor shall develop and submit a detailed project management plan for accomplishing the tasks identified in this SOW. This plan shall include timelines, milestones, resource requirements, tasks, deliverables, and deliverables acceptance criteria to perform the tasks for this SOW.

6.6.1.3 Weekly Project Management Briefings

The contractor shall conduct weekly project management briefings for the Project Contract Manager addressing risk assessment activities, schedule, findings and corrective action planning. Provide the Project Contract Manager with written agendas of the weekly briefing.

6.6.1.4 Monthly Status Reports

The contractor shall submit monthly written status reports to the Project Contract Manager in a prescribed document format that will be provided. The reports must contain specific information on each deliverable including:

- Work accomplished for each specific deliverable
- A brief overview of the research conducted to date
- Preliminary findings
- Identification of risks and issues that will impede completion of the work/study
- Recommendations regarding how to mitigate the impact of the identified risks and issues
- Budget detail that includes three reports (Excel samples of these reports are contained in Exhibit R).

Table 2. Deliverables Completion Schedule (days indicated are State Work days)

Task Group 6.6.1 Contractor Task Reporting and Management		
6.6.1.1	Task Accomplishment Plan (TAP) TAP Update	Due 10 State Work days following contract award. When changes occur
6.6.1.2	Detailed Project Management Plan Project Management Plan updates	Due 20 State Work days following contract award. Updated by the 5 th State business day of each month
6.6.1.3	Weekly Project Management Briefings	Weekly
6.6.1.4	Monthly Status Reports	By the 5 th State Work day of each month
6.6.1.5	Final Report	End of project plus 20 State Work days
Task Group 6.6.2 Transition In Tasks		
6.6.2.1	Transition In Plan	Due 5 State Work days following contract award.
6.6.2.2	Transition In Weekly Status Meetings	Weekly
6.6.2.3	Transition In Services	Due within 30 Calendar days following contract award.
Task Group 6.6.3 Project Management Support Tasks		
6.6.3.1	Infrastructure Evaluation and Task Report	Monthly
6.6.3.2	Work Order Evaluation and Task Report	Monthly
6.6.3.3	Software Changes Evaluation and Task Report	Monthly
6.6.3.4	Budget Evaluation and Task Report	Monthly
6.6.3.5	Problem Management Evaluation and Task Report	Monthly
6.6.3.6	CWS/CMS Technology Maintenance Plan and Strategic Plan Updates	Monthly
6.6.3.7	Risk Tracking Report	By the 10 th State Work day of each month
6.6.3.8	Document Procedures for CWS/CMS Corrective Tracking Systems	Monthly
6.6.3.9	Project Process Improvement	On-going
6.6.3.10	Project Management Activities	On-going
Task Group 6.6.4 Unanticipated Tasks		
6.6.4	Unanticipated Services	When services are requested

- 6.8.2.1** Be certified as a Project Management Institute Project Management Professional (PMP)
- 6.8.2.2** Minimum of three (3) full time equivalent (FTE) years experience providing PM services
- 6.8.2.3** Minimum of two (2) FTE years experience providing SVV services for information technology project(s) defined as: a large-scale software integration project with a total project cost (for system planning through final system implementation activities) of at least \$50 million and at least 5000 users.
- 6.8.2.4** Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures.

Evaluation for these requirements will be based minimum qualifications.

6.8.3 Project Management Support Staff Experience

OSI is requesting Bidders to propose staffing configurations they believe will allow them to meet all contractual obligations in the most economical manner accumulatively; staff assigned to this contract must possess the following knowledge, skills and abilities (KSAs).

The Bidder agrees to provide information regarding references and staff capability for Key Personnel. The Bidder agrees that the State reserves the right to contact references to validate the proposed staff's experience and capabilities. All referenced work used to meet the requirements must have been performed within the past seven (7) years.

When proposing staff to the work for this RFP, the month, day, and year are required on the Staff Resume Format (Exhibit P) for the dates of each individual involvement. The Contractor must respond with minimum years for a staffing requirement based on Full Time Equivalent (FTE). For example, if a proposed staff worked for one (1) year on a project at 50% of the time, six (6) months of experience would be accrued for the project. No more than 100% will be accrued for any given time period (i.e., a proposed staff cannot be credited for 75% on one project and 50% on another project for the same time period).

Proposed PM Support Staff must meet the following minimum KSAs as outlined in Table 3. Team Skill Cross Reference:

- 6.8.3.1** Staff assigned must be certified as a PMP.
- 6.8.3.2** A minimum of four (4) FTE years experience advising Information Technology (IT) projects in the use, acceptance, and implementation of commercial best practices and standards (e.g. IEEE, PMBOK, SEI, ITIL).
- 6.8.3.3** A minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures.

Table 3. Team Skill Cross Reference

Knowledge, Skills, and Abilities Area	KSA's Possessed by (enter Staff Name(s))
PMS Manager	
1. PMS Manager assigned to this contract must be certified as a PMP.	
2. Minimum of three (3) full time equivalent (FTE) years experience.	
3. Providing PM services and minimum of two (2) years FTE experience.	
4. Minimum of two (2) FTE years experience providing SVV services for large-scale information technology project(s) defined as: a large-scale software integration project with a total project cost (for system planning through final system implementation activities) of at least \$50 million and at least 5000 users.	
5. Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures.	
PM Support Staff	
1. Staff assigned to the PM tasks in this contract are PMP certified.	
2. Minimum of four (4) FTE years experience advising Information Technology (IT) projects in the use, acceptance, and implementation of commercial best practices and standards (e.g. IEEE, PMBOK, SEI, ITIL).	
3. Minimum of four (4) years experience with IT M&O contract management processes, policies and procedures.	
4. Minimum of four (4) FTE years experience within an IT environment analyzing, documenting and mitigating issues and recommendations from: <ul style="list-style-type: none"> • Internal processes (Software Systems Engineering V&V results, software vendor reports/correspondence, project documents, etc.) • External processes (Independent Project Oversight Contractors (IPOC) and Independent Verification and Validation (IV&V) contractors and State and federal requirement. 	
5. Minimum of four (4) FTE years experience providing PM&SVV services according to IEEE 1012 standards for large-scale IT M&O projects defined as: a large-scale software integration project with a total project cost (for system planning through final system implementation activities) of at least \$30 million and at least 5000 users.	

6.9 Invoicing

The Contractor shall render invoices for total monthly charges in the month following the month for which the charges accrue monthly (in arrears) for completed deliverables. The Contractor must submit monthly invoices within seven (7) State business days after the end of each month. Late invoice submittal may cause delay in payment. The OSI shall retain out of the amount the Contractor has earned and invoiced ten percent (10%) pending satisfactory contract completion and acceptance of all deliverables. Each Task Report is considered a deliverable.

The criteria the State will use to determine “acceptable work products” will be based on satisfactory completion of deliverables. If the OSI Contract Manager does not accept specific line items of an invoice because the associated deliverables are not deemed to

8. PROPOSAL FORMAT AND CONTENT

8.1 Proposal Requirements

8.1.1 Bid Format and Number of Copies

Submit five (5) hardcopies (one marked as the Master) and one (1) softcopy (in Microsoft Office 2003 format) of your response to the Procurement Official listed in Section I, "Procurement Division Official."

8.1.2 Due Date and Time

All bids must be received by the Procurement Division Official named in Section I, "Procurement Division Official", no later than the date and time specified in Section 1.9, "Key Action Dates."

8.2 Proposal Items by Volumes

8.2.1 Volume 1

Cover Letter, signed

Table of Contents

Proposal Response Cross Reference Checklist (Table 4)

Executive Summary

Certification to do Business in the State of California

Use of Subcontractor Items

- Bidder Responsibility as prime contractor
- Management of subcontractors
- Intent to use subcontractors
- Procedures for managing subcontractors
- Notice of Aware to subcontractors

Documentation:

- Payee Data Record
- Workers' Compensation Certification
- Non-Discrimination Compliance Statement

DVBE Participation Program Compliance Options (with NO dollar or value information)

- Std 840 Documentation of Disabled Veterans Business Enterprise Program Requirements
- Std 843 DVBE Declaration
- GSPD-05-105 Bidder Declaration

Target Area Contract Preference (TACPA) (optional)

Local Agency Military Base Recovery Act (LAMBRA) Preference (optional)

Enterprise Zone Act (EZA) (optional)

Small Business Preference (optional)

- Small Business Status
 - Small Business Status Form
 - Small Business approval letter from DGS (optional)

8.2.2 Volume 2 – Completed and Signed Contract (STD. Form 213)

8.2.3 Volume 3 – Response to Technical Requirements

Written Staffing Plan

Resource and Cost Plan, Exhibit S

Proposed Staff Resumes

Past Performance References, minimum of three (3) or maximum of five (5)

8.2.4 Volume 4 – Sealed Cost Data

Submit five (5) hardcopies (one marked as the Master) and one 91) softcopy (in Microsoft Office 2002 format) of fully completed Proposed Contract Costs in within separate sealed cover to the Procurement Official listed in Section I, “Procurement Division Official.”

8.3 Proposal Response Cross Reference Checklist

The following table is for the purposes of Bidder verifying required and optional document contents for both the Draft proposal and Final Proposal. The Bidder must enter the volume Page Number column to indicate the specific volume and page number in their response where each item can be found.

Table 4. Proposal Response Cross Reference Checklist

Proposal Item #	Page Number	Content Requirement	Bidders Initials - Submitted
Vol. 1		Volume 1	
1		Cover Letter, signed	

9.2 Staff Experience: Pass/Fail

The Staff Experience requirements are pass/fail and are comprised of reviewing:

- Written Staffing Plan
- Completed Table 3 – Team Skill Cross Reference
- Resumes for all proposed staff

Table 1. Pass/Fail Staff Minimum Qualifications

Minimum Qualifications	Pass/Fail
PMS Manager	
1. PMS Manager assigned to this contract must be certified as a PMP.	Pass/Fail
2. Minimum of three (3) full time equivalent (FTE) years experience.	Pass/Fail
3. Providing PM services and minimum of two (2) years FTE experience.	Pass/Fail
4. Minimum of two (2) FTE years experience providing SVV services for large-scale information technology project(s) defined as: a large-scale software integration project with a total project cost (for system planning through final system implementation activities) of at least \$50 million and at least 5000 users.	
5. Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures.	Pass/Fail
PMS Staff	
1. Staff assigned are certified Project Management Professionals (PMP).	Pass/Fail
2. Minimum of four (4) FTE years advising Information Technology (IT) projects in the use, acceptance, and implementation of commercial best practices and standards (e.g. IEEE, PMBOK, SEI, ITIL).	Pass/Fail
3. Minimum of four (4) FTE years experience with IT M&O and contract management processes, policies and procedures.	Pass/Fail