A. OVERVIEW

This Statement of Work (SOW) provides an overview of the IT Consulting Services under this MSA to be provided to State agencies, cities, counties, special districts, educational and other public sector entities within the State of California.

B. SERVICE CATEGORIES

Contractor personnel must be able to perform the following service subcategories, and they must be performed by the staff classification and experience as explained below. All certifications and resumes will be required when responding to a Request for Offer (RFO), released by the user agency.

Primary Category I - Independent Verification and Validation (IV&V):

Provides oversight of deliverables such as program code, test scripts and results, and network configurations and processes used to create the products. Determines whether the products of each step in the development cycle will fulfill all the requirements and whether processes used follow the intended life cycle methodology. Deliverables include project timelines; critical path implementation reviews; requirements matching; deliverables reporting; and project risk assessment.

Classifications for this Category:

- Senior Project Manager
- Project Manager
- Senior Technical Lead
- Technical Lead

Primary Category II - Project Implementation Activities

The services under this category are for use in IT projects where the ordering agency has identified a need for contractor services in the implementation of an IT project.

Subcategories:

II.A - Programming: Writes, tests and maintains the detailed instructions – referred to as “programs” or “software” that list in logical order the steps that computers must execute to perform their functions. Knowledge in basic program language such as; HTML, JAVA, C++, UNIX, BASIC and COBOL.

II.B - System Analysis/Design/Implementation: Assists with business process documentation, data modeling, system modeling, application system analysis, the
creation of general and detail system design specifications, and the development and execution of a system.


Establishes policies and procedures for data security, maintenance, data warehouse modeling, and utilization of the development, testing, training, and production environment across all platforms.

Classifications for this Category:

- Senior Project Manager
- Project Manager
- Senior Technical Lead
- Technical Lead
- Application Analyst-Business Oriented
- Systems Analyst
- Senior Programmer
- Programmer
- Technical Writer

Primary Category III - Project Support Activities

III.A - IT Planning: Conducts market studies, research, and documentation of administrative requirements for information technology projects such as preparation of Feasibility Study Reports (FSRs), solicitation documents, and Post Implementation Evaluation Reports (PIERs), impact analysis plans, disaster recovery (DR) plans and analysis of backup/recovery plans.

III.B - IT Facilitation: Provides training curricula, conducts training sessions for customer agency’s specific processes, and for systems developed under this Contract/MSA. Knowledge in basic program language such as: HTML, JAVA, C++, Unix, BASIC and COBOL.

III.C - Technical Writer: Gathers, analyzes, and composes technical information required for preparation of user manuals, training materials, proposals and reports. Knowledge in basic program language such as; HTML, JAVA, C++, UNIX, BASIC and COBOL.

Classifications for this Category:

- Project Manager
- Instructor
- Technical Writer
C. JOB CLASSIFICATIONS AND STAFF EXPERIENCE REQUIREMENTS

Each contractor will be responsible for providing qualified staff in each job classification for every service subcategory bid in its proposal.

• SENIOR PROJECT MANAGER

Responsibility: A Senior Project Manager is at the full journey level and is responsible for the most complex projects. This classification manages both internal and external project teams and interacts with department heads, agency secretaries at the ordering agency, State control agencies, and individuals of similar status in the private sector. The Senior Project Manager has full responsibility for the project’s tasks and deliverables associated with time, cost, quality assurance, human resources, communication, risk, procurement, and scope management.

Experience: This classification must have a minimum of seven (7) years of broad and extensive project management (PM) experience. At least four (4) years of that experience must have been in a lead capacity.

Education: This classification requires the possession of a bachelor’s degree or equivalent university degree, and a Project Management Professional (PMP) certification from the Project Management Institute (PMI) which will be verified with the bidder’s response to the Request For Offer (RFO) released by the user agency.

• PROJECT MANAGER

Responsibility: A project manager is at the journey level, usually working under the direction of a senior project manager and is responsible for projects while interacting with mid-level officials of similar status at the ordering agency and private sector. This classification is responsible to establish and maintain cooperative working relationships; use interdisciplinary teams effectively in the conduct of the project; speak effectively before large groups; reason logically and creatively and use a variety of analytical research techniques to solve complex problems; analyze situations and propose an effective course of action; analyze data; provide quality assurance, identify the need for and provide creative thinking related to complex problems, develop and evaluate alternatives, write thorough, credible, well-documented reports; conduct market studies; research, and document administrative requirements for preparation of Feasibility Study Reports; and work within tight deadlines associated with the project’s time, cost, quality, human resources, communication, risk, procurement, and scope management.

Experience: This classification must have a minimum of five (5) years of broad and extensive project experience. At least three (3) years of the experience must have been in a lead capacity.

Education: This classification requires the possession of a bachelor’s degree or equivalent university degree, and a Project Management Professional (PMP) certification from the Project Management Institute (PMI) which will be verified with the bidder’s response to the Request For Offer (RFO) released by the user agency.
• SENIOR TECHNICAL LEAD

Responsibility: A Senior Technical Lead is at the full journey level and acts in a lead capacity on complex projects routinely interacting with mid-level officials of similar status at the ordering agency/private sector. The incumbent must be able to lead technical personnel in a variety of projects including electronic information processing systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with data processing systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks. In addition, this classification must be able to analyze data and situations, identify and solve problems, reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

Experience: This classification must have a minimum of seven (7) years of experience in projects. At least four (4) years of that experience must have been in a lead capacity.

Education: This classification requires the possession of a bachelor's or equivalent university degree, or certificate in management information systems or computer science.

• TECHNICAL LEAD

Responsibility: A Technical Lead is at the journey level, performing progressively responsible analytical work in a variety of electronic information systems analysis, design, development, installation, implementation, procurement, or technical support duties in connection with data processing systems, multifunction office automation systems, microcomputer systems, or teleprocessing networks.

Experience: This classification must have a minimum of five (5) years of experience in similar projects. At least three (3) years of that experience must have been in a lead capacity. This classification must be able to analyze data and situations; identify and solve problems; reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

Education: This classification requires the possession of a bachelor's or equivalent university degree, or certificate in management information systems or computer science.

• APPLICATION ANALYST-BUSINESS ORIENTED

Responsibility: An Application Analyst designs system requirements based upon business requirements; is at the full journey level working under general supervision of a Technical Leader or Project Manager; performs a variety of tasks in connection with the analysis, development, installation, implementation, procurement, or support of electronic information processing systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems; and/or participates with other
analysts on electronic information processing systems studies of complex nature or broad scope. This classification must be able to analyze data and situations; identify and solve problems; reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Experience:** This classification must have a minimum of five (5) years of experience in working on data processing related projects. At least three (3) years of that experience must have been in application development or maintenance of data processing systems.

**Education:** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelor’s or equivalent university degree in management information systems or computer science.

• **SYSTEMS ANALYST**

**Responsibility:** A Systems Analyst develops systems requirements into system design specifications; is the full journey level working under general supervision of a Technical Leader or Project Manager performing a variety of tasks in connection with the analysis, development, installation, implementation, procurement, or support of electronic information processing systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems; and/or participates with other analysts on electronic information processing systems studies of complex nature or broad scope including independent verification and validation. This classification must be able to analyze data and situations; identify and solve problems; reason logically and draw valid conclusions; develop effective solutions; apply creative thinking in the design of methods of processing data with electronic computers; monitor and resolve problems with information processing systems hardware, software and processes; establish and maintain effective working relationships with others; communicate effectively verbally and in writing.

**Experience:** This classification must have a minimum of five (5) years of experience in working on data processing related projects. At least three (3) years of that experience must have been in systems analysis and design.

**Education:** Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelor’s or equivalent university degree in management information systems or computer science.

• **SENIOR PROGRAMMER**

**Responsibility:** A Senior Programmer acts in a lead capacity on the most complex applications, and/or on the most complex data processing problems and can work independently as a high level technical specialist. This classification must have knowledge of electronic computer programming; electronic data processing equipment and its capabilities; principles and techniques of studying work processes for new or revised electronic computer applications; principles of designing methods of processing data; technical report writing; independent verification and validation and statistical methods. This classification must also have the ability to write complex programs and
develop detailed program specifications; analyze data and situations, reason logically and creatively; identify problems; draw valid conclusions; develop effective solutions; apply creative thinking in the design and development of methods of processing data with electronic computers; establish and maintain cooperative working relationships with those contacted in the course of the work; speak and write effectively and prepare effective reports.

Experience: This classification must have a minimum of seven (7) years of experience in electronic data processing systems study, design, and programming, at least four (4) years of which shall have included responsibility on a project basis for analyzing operational methods and developing computer programs to meet desired results. Knowledge in basic program language such as; HTML, JAVA, C++, UNIX, BASIC and COBOL.

Education: Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelor’s or equivalent university degree in management information systems or computer science.

• PROGRAMMER

Responsibility: A Programmer acts under general supervision, and can act in a lead capacity on complex applications, and/or on complex data processing problems and can work independently as a technical specialist. This classification must have knowledge of electronic computer programming; electronic data processing equipment and its capabilities; principles and techniques of studying work processes for new or revised electronic computer applications; principles of designing methods of processing data; technical report writing; independent verification and validation and statistical methods. This classification must have the ability to write complex programs and develop detailed program specifications; analyze data and situations, reason logically and creatively; identify problems; draw valid conclusions; develop effective solutions; apply creative thinking in the design and development of methods of processing data with electronic computers; establish and maintain cooperative working relationships with those contacted in the course of the work; speak and write effectively and prepare effective reports. Knowledge in basic program language such as; HTML, JAVA, C++, Unix, BASIC and COBOL.

Experience: This classification must have a minimum of five (5) years of experience in electronic data processing systems study, design, and programming, at least three (3) years of which shall have included responsibility on a project basis for analyzing operational methods and developing computer programs to meet desired results.

Education: Possession of IT career certification that acknowledges skills and competency in the area of specialization. This classification requires the possession of a bachelor’s or equivalent university degree in management information systems or computer science.

• INSTRUCTOR

Responsibility: An Instructor is responsible for developing, presenting, and training agency staff on applications developed under this contract. The Instructor will be responsible for managing tasks related to consulting, planning, programming, organizing, scheduling, and conducting training on IT systems. The Instructor will provide
consultation, manuscripts, and present instruction, coordinate the construction or preparations of training aids using good judgment and discretion in the form, content, and method of presenting the subject material. Instructor shall also select and manage technical training assistants, and organize facilities to support the training effort; develop and maintain a master calendar of events; and be able to communicate effectively with technical and non-technical staff.

Experience: This classification requires four (4) years of experience in providing IT instruction and proficiency in training principles and methods.

Education: This classification requires the possession of a bachelor’s or equivalent university degree in management information systems, computer science, business or communications.

• TECHNICAL WRITER

Responsibility: A Technical Writer has a high level of expertise in word processing packages including Microsoft Word and WordPerfect; develops user instruction, reference and procedures manuals for computer systems; provides the selection and implementation of on-line help facilities for applicants; translates technical information into clear, readable documents to be used by technical and non-technical personnel.

Experience: This classification must have a minimum of four (4) years of experience in related projects. Knowledge in basic program language such as; HTML, JAVA, C++, UNIX, BASIC and COBOL.

Education: This classification requires the possession of a bachelor’s or equivalent university degree in management information systems, computer science, business or communications.