California
DEPARTMENT OF TECHNOLOGY

Request for Interest
CDT–PQVP–0118
Addendum 1

Pre-Qualified Vendor Pool for
Agile Development – Digital Services

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Issued By:

STATE OF CALIFORNIA
Department of Technology
Statewide Technology Procurement
PO Box 1810
Rancho Cordova, CA 95741
ADPQ@state.ca.gov

Disclaimer: The original PDF version released for this RFI remains the official version. In the event of any inconsistency between the vendor versions, articles, attachments, specifications, or provisions which constitute the PQVP AD-DS list, the official version of the RFI in its entirety shall take precedence.

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A. Pre-Qualified Vendor Pool for Agile Development—Digital Services Overview

The California Department of Technology (CDT) seeks to refresh and increase the pre-qualified pool from the current twenty-four (24) Vendors up to thirty-five (35) Vendors which will provide the California Health and Humans Services (CHHS) Agency and other approved State Agencies/Departments with user-centric design and agile software development services under the Pre-Qualified Vendor Pool for Agile Development—Digital Services (PQVP AD-DS). For historical background information on PQVP AD-DS, please visit CDT's GitHub (https://github.com/cdtprocurement/adpq) website.

Benefits of PQVP AD-DS include, but are not limited to, the following:

- Reduction in solicitation time and administrative costs to the State and Vendors; and
- Ability to review Vendors' user-centric design and agile software development competencies prior to soliciting offers.

CDT will continue to consistently innovate and renew the PQVP AD-DS.

After the PQVP AD-DS list has been established, approved State Agencies/Departments will be able to develop and release PQVP AD-DS Request for Offers (RFO) to the pre-qualified pool of Vendors.

A.1 PQVP AD-DS Key Action Dates

Listed below are the Request for Interest (RFI) Key Action Dates and Times by which actions should be taken and/or completed. All times listed are Pacific Standard Time.

Event	Date(s)/Time
Release of Official RFI	02/12/18
Due Date to Submit Vendor Questions and PQVP AD-DS Vendor Profile (via email)	02/20/18 by Noon
Release of Answers to Vendor Pool Questions	02/26/18
Administrative Requirements Submission Open Window*	02/20/18 – 06/12/18
Due Date for Complete RFI Response Submission Package	03/16/18 by 5:00 p.m.
Assessment of Vendor RFI Response Submissions**	03/19/18 – 04/10/18
PQVP AD-DS Selection Announcement**	04/13/18
Expiration of Sixty (60) Day Window to Submit Vendor CMAS/GSA Agreement and/or IT MSA and PQVP AD-DS/CMAS Classification Mapping**	06/12/18 by 5:00 p.m.

* Administrative Requirements can be submitted during the Administrative Requirements Submission Open Window (ARSOW) period. However, Vendors are highly encouraged to submit all Administrative Requirements by the RFI Response Submission Package Due Date (03/16/2018). See Section G. PQVP AD-DS Administrative Requirements for additional details.

** Dates and times are subject to change.

A.2 RFI Addenda

If the CDT finds it necessary to modify this RFI, changes will be accomplished via an addendum. However, dates listed after the RFI Response Submission Package due date are estimated and may be adjusted without an addendum.

A.3 Term of PQVP AD-DS List

The PQVP AD-DS will be effective from the notice of PQVP AD-DS Selection Announcement (see Section A.1, PQVP AD-DS Key Action Dates) and shall remain effective at CDT's sole discretion. PQVP AD-DS Vendors have the opportunity to remove themselves from the PQVP AD-DS at any time (see Section F.2, PQVP AD-DS Maintenance, Off-Boarding).

A.4 Availability

Vendors selected to be included in the PQVP AD-DS must be ready to respond to PQVP AD-DS RFOs within sixty (60) calendar days of the PQVP AD-DS Selection Announcement. In addition, if key changes are made at any time that effect the Vendor's ability to adhere to the PQVP AD-DS requirements, and the Vendor becomes unable to participate in the PQVP AD-DS, the Vendor must notify CDT immediately for resolution.

CDT makes no guarantee that any services will be awarded as a result of the PQVP AD-DS. There is no minimum amount of services that Vendors should expect.

A.5 PQVP AD-DS Contact Information

All questions and submissions for the PQVP AD-DS should be directed to CDT's PQVP-specific email address: ADPQ@state.ca.gov.

B. PQVP AD-DS Process Components

The PQVP AD-DS Process consists of the following tasks:

1. CDT will release RFI # CDT-PQVP-0118 on Cal eProcure and GitHub.
2. CDT will provide Vendors the opportunity to ask questions.
3. CDT will release a Question and Answer (Q&A) set to address Vendor questions related to the PQVP AD-DS Process and RFI requirements.
4. Vendors shall submit common administrative materials (see Attachment A: PQVP AD-DS Administrative Requirements Checklist) for CDT's master file. Vendors may submit these documents during the ARSOW period. Unless otherwise specified, these common documents will not be required to be submitted for individual PQVP AD-DS RFO.
5. Vendors shall submit a Working Prototype and a narrative description of the Technical Approach used to create the prototype (see Attachment 1: PQVP AD-DS Working Prototype Guidelines and Technical Approach Requirements for details).
6. CDT will review each Vendor's Working Prototype and Technical Approach to add new Vendors to the PQVP AD-DS list to provide user-centric design and agile software development services for the State.
7. A California Multiple Awards Schedule (CMAS) and/or Information Technology (IT) Master Service Agreement (MSA) contract is not required to participate in the PQVP AD-DS Screening Process. However, Vendors who have a valid CMAS and/or IT MSA by the time

RFI Response Submission Packages are due are encouraged to submit a full copy of their CMAS contract and associated GSA Agreement and/or their IT MSA with their RFI Response Submission. All Vendors selected for inclusion in the PQVP AD-DS will be required to have a valid CMAS contract using a GSA Federal Supply Schedule 70 base contract and/or IT MSA within sixty (60) calendar days of being added to the PQVP AD-DS, unless an exemption from CDT has been obtained by the Vendor. Furthermore, Vendors will not be able to respond to a PQVP AD-DS RFO unless they have a valid CMAS and/or IT MSA contract.

8. Attachment 4: CMAS Contract Application Information, provides details regarding the CMAS contract application process.
9. Attachment 5: PQVP AD-DS RFO Information, provides details regarding the PQVP AD-DS RFO process.

C. PQVP AD-DS Questions

Vendors must submit questions regarding the PQVP AD-DS, via email, by the date and time stated in the A.1, PQVP AD-DS Key Action Dates. Each question set shall be submitted in the following format:

1. "RFI # CDT-PQVP-0118, PQVP AD-DS Question(s)" must be in the subject line of the email;
2. Vendor name, contact name, contact phone number, and contact email address must be in the body of the email; and
3. Questions must be submitted using the layout provided below. Questions must be submitted in either MS Word or MS Excel format only. **Do not submit questions to CDT via Cal eProcure.**

Question Number	Question Type	RFI Section (Admin/Technical)	Question

D. PQVP AD-DS Participation and Submission Instructions

Vendor RFI Response Submissions shall be prepared in such a way as to provide a straightforward and concise delineation of capabilities to satisfy the requirements of this RFI. Expensive bindings, colored displays, promotional materials, etc., are not necessary and are not desired. Emphasis must be concentrated on compliance with the RFI instructions, responsiveness to the RFI administrative and technical requirements, and on completeness and clarity of all content. Before submitting each document and/or prototype, Vendors should carefully proof it for errors and adherence to all RFI requirements.

Vendor RFI Response Submission Packages, materials, and correspondence relating to this RFI will be completed/performed by the Vendor at no cost to the State, in accordance with State Contracting Manual Volume 3, Chapter 4, Topic A, Section 4.A1.11.

D.1 Participation Instructions

Incumbent Vendors on the existing PQVP Vendor Pool list do not need to resubmit a Vendor Profile, Working Prototype, or written Technical Approach. However, incumbent Vendors must comply with all Administrative Requirements within sixty (60) days of the PQVP AD-DS

Selection Announcement as with all other selected Vendors. Failure to submit Administrative Requirements by the due date, may cause a Vendor to be removed from PQVP AD-DS.

Prospective Vendors must:

a. Submit a PQVP AD-DS Vendor Profile, Working Prototype, and written Technical Approach by the RFI Response Submission date and time stated in Section A.1, PQVP AD-DS Key Action Dates;

b. Comply with all instructions and requirements set forth in this RFI and subsequent Working Prototype and Technical Approach instructions; and

c. Publish all prototype source code, design assets, and all associated documentation that they used to satisfy all facets of Attachment 1: PQVP AD-DS Working Prototype Guidelines and Technical Approach Requirements, to an online and publicly-accessible GitHub repository. Posting a repository in a different version control system will not be accepted and may disqualify a Vendor. Vendors are allowed, and encouraged, to include any kind of documentation in the repository, including photographs, screenshots, or notes on their development and design process:

   - The GitHub repository can be set to "private" while Vendors' are developing source code, designing assets, and creating associated documentation for their Working Prototype. However, the GitHub repository must be set to "public" by the RFI Response Submission due date and time stated in Section A.1, PQVP AD-DS Key Action Dates.
   - 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 Working Prototype and supporting Technical Approach artifacts shall be preserved, without modification, for a minimum of one hundred twenty (120) calendar days after the PQVP AD-DS Selection Announcement.
   - CDT intends to copy the selected PQVP AD-DS Vendors' repository of source code and supporting technical artifacts for republication for a period of not less than six (6) months after the PQVP AD-DS Selection Announcement.

D.2 Disposition of Submissions

All materials submitted in response to this RFI, upon submission, become the property of the State of California. All materials will be retained in CDT's master files and will become a public record.

E. PQVP AD-DS Screening

E.1 Screening Process

The PQVP AD-DS Screening Process will be determined by a pass/fail compliance review of the Administrative Requirements and a technical review of the Vendor's Working Prototype and Technical Approach narrative. The Vendor's proposed mix of labor categories and level of effort for its Working Prototype will be reviewed to assess the Vendor's understanding and capability to supply user-centric design and agile software development services.

CDT intends to select Vendors who achieve the highest rating in regards to their Working Prototype and description of their Technical Approach. The three (3) ratings associated with the screening and selection process are: Exceptional, Acceptable, and Non-Acceptable.

The CDT Screening Team will review and validate the submitted package to determine whether the required content is in conformance with the requirements of this RFI. Absence of required information may result in the submission being deemed incomplete and may cause a Vendor to be disqualified.

If during the Screening Process, the CDT Selection Team is unable to assure itself of the Vendor's ability to perform, CDT reserves the right to request clarification from the Vendor, which CDT deems necessary to determine the Vendor's responsibility.

A CMAS and/or IT MSA contract is not required to participate in the PQVP AD-DS Screening Process. All Vendors selected will be required to have a valid CMAS contract using a GSA Federal Supply Schedule 70 base contract and/or an IT MSA within sixty (60) calendar days of being added to the PQVP AD-DS list, unless an exemption has been obtained from CDT.

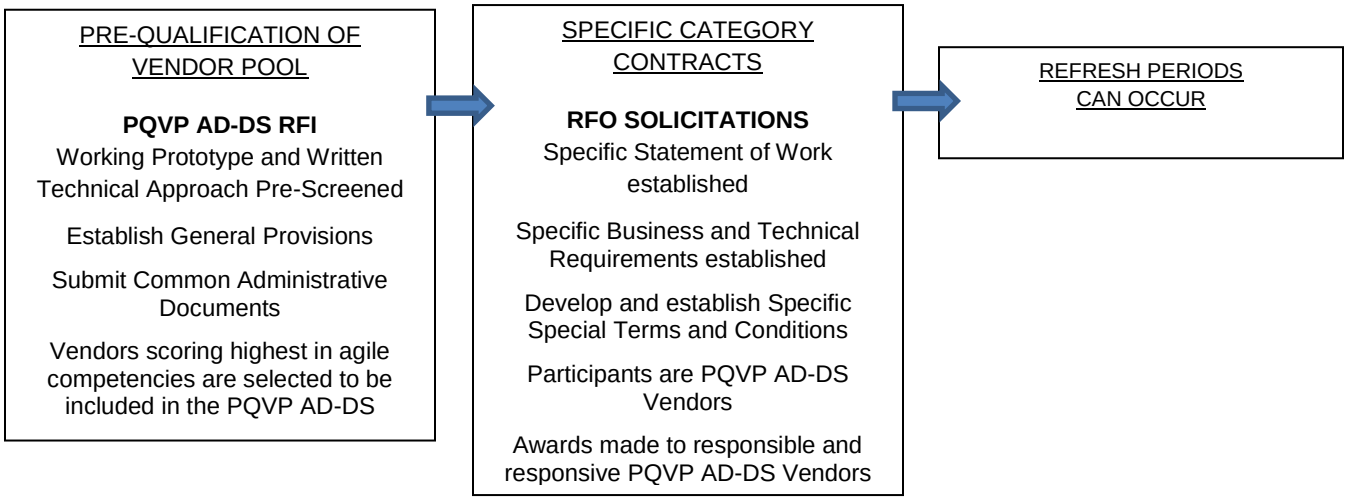
E.2 Non-Acceptable Rating

The following scenarios are conditions that will constitute a Non-Acceptable Rating and will disqualify a Vendor from being selected for the PQVP AD-DS:

- If a commit is made to the branch subject to review after the RFI Response Submission Package due date;
- If the code, or any design asset, of the prototype is changed on the GitHub server after the RFI Response Submission Package due date;
- If accessing the prototype via the publicly-available URL identified at the top of the README.md file generates HTTP 4xx or 5xx errors; and/or
- If Vendors submit additional terms and conditions.

F. PQVP AD-DS Maintenance

Maintenance of the PQVP AD-DS includes, but is not limited to, the following:



F.1 On-Boarding

CDT will be responsible for on-boarding Vendors into the PQVP AD-DS. This includes, but is not limited to:

- Determining the number of Vendors that will be required in the PQVP AD-DS;
- Determining which Vendors will be given the opportunity to participate in the PQVP AD-DS;
- Contacting the Vendors and providing them with pre-qualification criteria (this can include clarification on responses submitted) and informing them of their submission status and/or results;
- Assessing Vendor submissions to determine if they qualify for the PQVP AD-DS;
- Continuing to include more Vendors until the optimum number of pre-qualified Vendors has been reached; and
- Conducting PQVP AD-DS Refreshes, as needed, to maintain the prime level of available Vendors for statewide usage.

F.2 Off-Boarding

A Vendor may be removed from the PQVP AD-DS and become ineligible to participate in future PQVP AD-DS RFOs for one (1) or more of the following reasons:

- Vendor who has been awarded a contract from an PQVP AD-DS RFO has their respective contract has been terminated;
- Vendor who was selected to be included in the PQVP AD-DS has their CMAS and/or IT MSA contract terminated;
- Vendor has failed to submit an offer to an PQVP AD-DS RFO since the last time the PQVP AD-DS was refreshed, provide that at least three (3) PQVP AD-DS RFOs were released by the State in the previous qualifying period; and/or
- Vendor has notified CDT, in writing, they wish to be removed from the PQVP AD-DS. Requests for removal must be submitted to ADPQ@state.ca.gov.

CDT will contact the Vendor to inform them, in writing, that they have been, or will be, removed from the PQVP AD-DS. The State will allow the terminated Vendor five (5) business days to appeal to the State's notification in writing. An appeal to a termination shall be submitted to ADPQ@state.ca.gov.

F.3 Vendor Responsibilities

It is the Vendor's responsibility to keep current on all certifications, documentation, and/or information required herein. If changes, modifications, expirations, and/or deletions of any of the Administrative Requirements transpire, the Vendor shall provide notification to the CDT immediately. CDT will process the updates required to the contractor's information upon receipt of legal documentation (e.g., notarized documentation of name change).

The State reserves the right to withhold payments for contracts awarded off subsequent PQVP AD-DS RFOs, at any time, for Vendors who are not in compliance with any Administrative Requirements identified in this RFI.

F.4 Refresh Opportunities

This PQVP AD-DS process will allow for an ongoing expansion of Vendors to the PQVP AD-DS List, enabling further participation in future user-centric design and agile software development services.

The terms, conditions, requirements, and information from this RFI will be applicable to each subsequent PQVP AD-DS RFO. Vendors who are not able to provide offers due to the inability to meet specific PQVP AD-DS RFO requirements are still expected to respond to the PQVP AD-DS RFO by providing an explanation as to why they are unable to submit an offer.

G. PQVP AD-DS Administrative Requirements

To minimize the disqualification of RFI Response Submissions due to administrative errors, CDT is providing Vendors the opportunity to submit common administrative documents (see Attachment A: PQVP AD-DS Administrative Requirements Checklist) during an optional Administrative Requirements Submission Open Window (ARSOW) period. CDT will evaluate the Vendor's administrative documents during the ARSOW for accuracy and provide Vendors a response, in writing, which will allow Vendors the opportunity to correct any errors prior to the due date for the Administrative Requirements. Vendors must submit all administrative documents during the ARSOW period to ADPQ@state.ca.gov.

Unless otherwise specified, these common administrative documents will not be required to be submitted in response to individual PQVP AD-DS RFOs.

Vendors selected to be included in the PQVP AD-DS must submit the following documents to CDT within sixty (60) calendar days of the PQVP AD-DS Selection Announcement. Failure to submit the Administrative Requirements will cause a Vendor to be removed from PQVP AD-DS:

G.1 Confidentiality Statement

The Vendor must agree to the State's confidentiality requirements by submitting a signed Attachment C: Contractor Confidentiality Statement, for the Vendor's company/firm.

The Vendor engaging in services pertaining to this RFI and related PQVP AD-DS RFOs who requires contact with confidential State data/information and/or the State's customer data/information shall be required to exercise security precautions for all such data/information that is made available to them and must accept full legal responsibility for the protection of the confidential data/information. This includes all statistical, personal, technical, and/or other confidential personal data/information relating to the State's operations that are designated confidential by the State.

The Vendor shall also be required, upon award of a contract from a PQVP AD-DS RFO, to submit a signed confidentiality statement for all personnel, agents, and subcontractors assigned to the awarded contract.

G.2 Payee Data Record (STD 204)

The Payee Data Record (STD 204) indicates the Vendor is subject to state income tax withholdings pursuant to California Revenue and Taxation Code §18662.

The Vendor must complete and submit the Payee Data Record (STD 204) with its RFI Response Submission as Attachment D: Payee Data Record (STD 204). The Vendor must provide the

company's Federal Employer Identification Number (Business Internal Revenue Service Number) on this form. The form can be located at the following website:

http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf

G.3 Bidder Declaration (GSPD-05-105)

The Vendor must complete and submit Attachment E: Bidder Declaration (GSPD-05-105). When completing the declaration, the Vendor must identify all subcontractors who participated in activities related to this RFI. If the Vendor is not using subcontractors, the Vendor must still complete Attachment E by answering the applicable questions on the form. The form is available at:

www.documents.dgs.ca.gov/pd/poliproc/MASTEr-BidDeclar08-09.pdf

The Vendor shall also be required, upon award of a contract from a PQVP AD-DS RFO, to submit a Bidder Declaration that identifies all subcontractors who will participate in activities related to the awarded contract.

G.4 California Secretary of State Certification

If required by law, the Vendor must submit a certificate of status from the California Secretary of State, showing that the Vendor is certified with the California Secretary of State to do business in the State of California. If the Vendor does not currently have this certification, the firm must be certified before any contract award can be made from a PQVP AD-DS RFO, and must provide information in its RFO response to support the status of its application to be certified to do business in the State of California.

Domestic and foreign corporations, Limited Liability Companies (LLCs), Limited Liability Partnerships (LLPs) and Limited Partnerships (LPs) must be registered with the California Secretary of State to be awarded a contract from a PQVP AD-DS RFO. The California Secretary of State Certification must be included with any RFO response. The required document(s) may be obtained through the California Secretary of State, Certification and Records Unit at (916) 657-5448 or through the following website:

http://kepler.sos.ca.gov/.

The Vendor must complete and submit the required documentation as Attachment F: California Secretary of State Certification.

G.5 California Seller's Permit (if applicable)

Subsequent PQVP AD-DS RFOs based off of this RFI are subject to all requirements set forth in §6452, §6487, §7101 and §18510 of the Revenue and Taxation Code §10295 of the Public Contract Code (PCC), requiring the Vendor to provide a copy of its retailer's seller's permit or certification of registration and, if applicable, the permit or certification of all participating affiliates issued by the State of California's Board of Equalization. The Vendor must complete and submit its documentation as Attachment G: Seller's Permit Certification. For more information on the Seller's Permit or Certification of Registration, refer to the following links:

http://boe.ca.gov/pdf/pub73.pdf and http://boe.ca.gov/.

G.6 Certificate(s) of Insurance

In accordance to the CMAS General Provisions – Information Technology (GSPD-401IT-CMAS), revision date 09/05/2014, Provision 20, Insurance, the Vendor shall furnish insurance certificate(s) evidencing required insurance coverage acceptable to the State, including

endorsements showing the State as an "additional insured," if required under the contract. Any required endorsements requested by the State must be separately provided; merely referring to such coverage on the certificate(s) is insufficient for this purpose. When performing work on State-owned or State-controlled property, the Vendor shall provide a waiver of subrogation in favor of the State for its Workers' Compensation policy. Additionally, the Vendor shall maintain statutory Worker's Compensation and Employer's Liability coverage for all its employees who will be engaged in the performance of any contract awarded from a PQVP AD-DS RFO, including special coverage extensions, where applicable. Employer's Liability limits of $1,000,000 shall be required.

The Vendor must submit Attachment H: Certificate(s) of Insurance. The Certificate(s) of Insurance (COI) does not need to name the State as an additional insured at the time of the RFI Response Submission Package. However, if a Vendor is awarded a contract from a PQVP AD-DS RFO, the Vendor will be required to submit the COI with the State named as additional insured within ten (10) calendar days of contract award.

G.7 Federal Responsibility Certification

The Vendor must complete and submit Attachment I: Federal Debarment, Suspension, Ineligibility, and Voluntary Exclusion Certification. This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 Code of Federal Regulations, Part 98, §98.510, Participants; responsibilities. This certification states that neither the Vendor, nor its principals, are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction, or subsequent PQVP AD-DS RFOs, by any federal department or agency. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

G.8 Iran Contracting Act of 2010 Certification

Division 2, Part 1, Chapter 2.7 of the PCC is the Iran Contracting Act of 2010. This Act §2203 requires that no one shall submit a proposal for a contract, or enter into or renew a contract, with a public entity for goods or services valued at $1,000,000 or more if that person (i.e., Bidder, Contractor, Vendor) engages in investment activities of $20,000,000 or more as described in PCC §2202.5 pursuant to all provisions of the Iran Contracting Act of 2010. The Iran Contracting Act of 2010, at §2204 requires Vendors to certify at the time the proposal is submitted or a contract is renewed, that the person is not identified on a list created pursuant to subdivision (b) of PCC §2203 as a person engaging in investment activities in Iran described in subdivision (a) of PCC §2202.5, or as a person described in subdivision (b) of PCC §2202.5, as applicable.

The Vendor must complete and submit Attachment J: Iran Contracting Act of 2010 Certification.

G.9 California Civil Rights Laws Certification

For contracts over $100,000 executed or renewed after January 1, 2017, the Vendor certifies compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code) and the Fair Employment and Housing Act (Section 12960 of the Government Code); and

For contracts over $100,000 executed or renewed after January 1, 2017, if a Vendor has an internal policy against a sovereign nation or peoples recognized by the United States government, the Vendor certifies that such policies are not used in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the Fair Employment and Housing Act (Section 12960 of the Government Code).

The Vendor must complete and submit Attachment K: California Civil Rights Laws Certification.

G.10 Irrevocable Offer Acknowledgement

Unless otherwise specified in a PQVP AD-DS RFO, the Vendor's final offer in response to a PQVP AD-DS RFO shall constitute a firm offer, which shall remain irrevocable for not less than ninety (90) calendar days following the date of contract award specified in the PQVP AD-DS RFO. In the event of a delay in contract award, a Vendor may extend the expiration date of its firm offer an additional thirty (30) calendar days by written notice to the State.

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-related reviews. The State's execution of a contract from a PQVP AD-DS RFO will 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 PQVP AD-DS RFO solicitation, to accept any other Vendor's firm offer and form a contract with the other Vendor. The State may continue to terminate and contract with any other Vendors, as described above, until the expiration of all acceptable and firm offers obtained from the original PQVP AD-DS RFO.

The Vendor must complete and submit Attachment L: Irrevocable Offer Acknowledgement.

G.11 Substitution of Key Staff Acknowledgement

Unless otherwise stated in the contract awarded from a PQVP AD-DS RFO, the Vendor shall obtain prior approval, in writing, from the State before attempting to change the Key Staff proposed in their response to subsequent PQVP AD-DS RFOs. This includes substitutions made between submission of the final offer and the actual start date of Project, as well as staffing changes during the course of the contact term. If a member of Vendor's Key Staff is unable to perform due to factors beyond Vendor's reasonable control (e.g., illness, resignation), the Vendor shall use its best efforts to promptly provide a suitable substitute. In the event replacement of Key Staff is required, the Vendor shall provide a replacement candidate that meets or exceeds the requirements of the PQVP AD-DS RFO and allow the State the opportunity to interview and approve the candidate. If the State rejects a proposed replacement staff member and a qualified replacement is not provided to the State for approval, the Vendor shall have a period of five (5) days to provide another replacement. Unless the State provides an extension in writing, the Vendor shall be in material breach of contract if an adequate replacement is not provided within the timeline required, and the Vendor and State cannot agree on the replacement within five (5) additional days. The State will not unreasonably delay or deny acceptance of Vendor's proposed candidate. The candidate receiving acceptance by the State shall be available to start immediately, unless otherwise agreed to by the State.

The Vendor must complete and submit Attachment M: Substitution of Key Staff Acknowledgement.

G.12 Cloud Computing General Provisions Acknowledgement

If the Vendor includes commercial Software as a Service (SaaS), Infrastructure as a Service (IaaS), and/or Platform as a Service (PaaS) as part of their Technical Approach during this RFI or for any contracts awarded from an PQVP AD-DS RFO, the Vendor shall comply with the State Model: Cloud Computing Services Special Provisions for SaaS, IaaS, and/or PaaS, which can be found at the following URL:

http://www.dgs.ca.gov/pd/Home/CloudComputing.aspx

Vendors must submit Attachment N: Cloud Computing General Provisions Acknowledgement to certify that they have read the current general provisions and agree to them.

G.13 General Provisions – Information Technology Acknowledgement

a. CMAS General Provisions – Information Technology (GSPD-401IT-CMAS)

CMAS contracts issued by DGS shall automatically incorporate, by reference, the CMAS General Provisions – Information Technology (GSPD-401IT-CMAS). The current version of the CMAS General Provisions – Information Technology (GDSP-401IT-CMAS) can be found at the following location:

https://www.documents.dgs.ca.gov/PD/CMAS/MASTCIT9-8-14.PDF

Vendors who have an existing CMAS contract, or anticipate applying for a CMAS contract, must submit Attachment O: CMAS General Provisions – Information Technology (GSPD-401IT-CMAS) Acknowledgement to certify that they have read the current general provisions and will agree to them.

b. General Provisions – Information Technology (GSPD-401IT)

IT MSA contracts issued by DGS shall automatically incorporate, by reference, the General Provisions – Information Technology (GSPD-401IT). The current version of the General Provisions – Information Technology (GDSP-401IT) can be found at the following location:

http://www.documents.dgs.ca.gov/pd/poliproc/gspd401it14_0905.pdf

Vendors who have an existing IT MSA with Agile Classifications must submit Attachment P: General Provisions – Information Technology (GSPD-401IT) Acknowledgement to certify that they have read the current general provisions and will agree to them.

G.14 Vendor CMAS-GSA/IT MSA Agreement

All Vendors who are selected to be included in the PQVP AD-DS must have a valid CMAS and/or IT MSA contract issued by DGS prior to responding to any PQVP AD-DS RFO. Vendors must submit Attachment Q: Vendor CMAS-GSA/IT MSA Agreement to CDT within sixty (60) calendar days of the PQVP AD-DS Selection Announcement (see Section A.1 PQVP AD-DS Key Action Dates). Vendors will be required to submit a separate Attachment Q: Vendor CMAS-GSA/IT MSA Agreement with a full copy of the respective Agreement.

G.15 PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing

All Vendors who are selected to be included in the PQVP AD-DS must submit Attachment R: PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing to CDT within sixty (60) calendar days of the PQVP AD-DS Selection Announcement (see Section A.1 PQVP AD-DS Key Action Dates). If after sixty (60) days Vendors cannot map their CMAS and/or IT MSA Classifications to the PQVP AD-DS Labor Categories, the Vendor may be removed from the PQVP AD-DS. Vendors will be required to submit a separate Attachment R: PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing for each respective contract.

Attachment 1: PQVP AD-DS Working Prototype Guidelines and Technical Approach Requirements

Vendors must publish all prototype source code, design assets, and all associated documentation that they used to satisfy all facets of Attachment 1: PQVP AD-DS Working Prototype Guidelines and Technical Approach Requirements, to an online and publicly accessible GitHub repository. Vendor shall identify their GitHub URL on Attachment B: PQVP AD-DS Vendor Profile, which must be included in its RFI Response Submission Package.

Any stored data should use an open source database. Database storage for the purpose of this RFI can be within the same layer for the prototype only for feasibility efforts due to time constraints. However, actual implementations must follow database best practices.

1. Working Prototype Guidelines

The submission of a Working Prototype serves as a sample task that CDT believes is representative of the type of task orders that may be issued against the PQVP AD-DS. Vendors are required to submit a Working Prototype that demonstrates its agile software development capabilities. Vendors must include a publicly-available URL to its prototype at the top of a README.md file located in the root director of their repository.

Vendors will be required to build a digital service Knowledge Management Tool (KMT) as their Working Prototype. The KMT will allow State Agencies/Departments to capture, archive, and manage organizational knowledge from its employees and programs. The KTM prototype does not need to implement any authentication or authorization against an external directory or authentication mechanism.

Working Prototype Guidelines:

a. Knowledge Creation

The Working Prototype should:

- Have the ability to easily create “knowledge articles” (KAs).
    - These can be original records (e.g., specific work instructions or content) and/or packages of content, including documents, user-configurable forms, tables, and workflows
- Have the ability to provide multiple levels and formats of information in KAs (e.g., bullet points for senior technical levels, scripted specific details for junior/non-technical staff)
- Allow for role-based security access, to allow control of access and level of information by login

b. Knowledge Sharing

The Working Prototype should:

- Allow for the promotion of process and information across systems and channels, as required
- Have the ability to create user-defined rules for creation (e.g., mandatory fields) and lifecycle management (e.g., who, how, when revised and updated)
- Trigger escalation processes (e.g., automated emails/texts to approvers, reminders) for lifecycle activities

c. Knowledge Development

The Working Prototype should:

- Have the ability to update and improve KAs and access the value of usage as input to predicting new records or record types
- Show innovation by learning from existing records (e.g., types, content, usage) and prompting to create new KAs

2. Technical Approach Requirements

Vendors shall write a brief description/narrative, no greater than 2,000 words, of the Technical Approach used to create their Working Prototype and place this description/narrative in the README.md file located in the root directory of its GitHub repository. This 2,000 word limit applies to the Technical Approach description/narrative only.

Documentation must show code flow from client UI, to JavaScript library, to REST service to database, pointing to code in the GitHub repository.

In addition to the description/narrative above, the Vendor must demonstrate that they followed the US Digital Services Playbook (visit https://playbook.cio.gov or see Attachment 2: US Digital Services Playbook) by providing evidence in the repository. The README.md file should also make reference to the following:

a. Assigned one (1) 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 (5) of the labor categories as identified in Attachment B: PQVP AD-DS Labor Category Descriptions;

c. Understood what people needed[1], by including people in the prototype development and design process;

d. Used at least a minimum of three (3) "user-centric design" techniques and/or tools;

e. Used GitHub to document code commits;

f. Used OpenAPI to document the RESTful API, and provided a link to the OpenAPI;

g. Complied with Section 508 of the Americans with Disabilities Act and WCAG 2.0;

h. Created or used a design style guide and/or a pattern library;

i. Performed usability tests with people;

j. Used an iterative approach, where feedback informed subsequent work or versions of the prototype;

k. Created a prototype that works on multiple devices, and presents a responsive design;

[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.*

l. Used at least five (5) modern[2] and open-source technologies, regardless of architectural layer (frontend, backend, etc.);

m. Deployed the prototype on an Infrastructure as a Service (IaaS) or Platform as Service (PaaS) provider, and indicated which provider they used;

n. Developed automated unit tests for their code;

o. Setup or used a continuous integration system to automate the running of tests and continuously deployed their code to their IaaS or PaaS provider;

p. Setup or used configuration management;

q. Setup or used continuous monitoring;

r. Deployed their software in an open source container, such as Docker (i.e., utilized operating-system-level virtualization);

s. Provided sufficient documentation to install and run their prototype on another machine; and

t. Prototype and underlying platforms used to create and run the prototype are openly licensed and free of charge.

[2] *"Modern" is to be understood as any technology or standard released, created, initiated or finalized in the five (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 2: US Digital Service Playbook

The official US Digital Service Playbook can be located at: https://playbook.cio.gov/.

Play 1: Understand What People Need

We must begin digital projects by exploring and pinpointing the needs of the people who will use the service, and the ways the service will fit into their lives. Whether the users are members of the public or government employees, policy makers must include real people in their design process from the beginning. The needs of people — not constraints of government structures or silos — should inform technical and design decisions. We need to continually test the products we build with real people to keep us honest about what is important.

Checklist

- Early in the project, spend time with current and prospective users of the service
- Use a range of qualitative and quantitative research methods to determine people's goals, needs, and behaviors; be thoughtful about the time spent
- Test prototypes of solutions with real people, in the field if possible
- Document the findings about user goals, needs, behaviors, and preferences
- Share findings with the team and agency leadership
- Create a prioritized list of tasks the user is trying to accomplish, also known as "user stories"
- As the digital service is being built, regularly test it with potential users to ensure it meets people's needs

Key Questions

- Who are your primary users?
- What user needs will this service address?
- Why does the user want or need this service?
- Which people will have the most difficulty with the service?
- Which research methods were used?
- What were the key findings?
- How were the findings documented? Where can future team members access the documentation?
- How often are you testing with real people?

Play 2: Address the Whole Experience, from Start to Finish

We need to understand the different ways people will interact with our services, including the actions they take online, through a mobile application, on a phone, or in person. Every encounter — whether it's online or offline — should move the user closer towards their goal.

Checklist

- Understand the different points at which people will interact with the service – both online and in person
- Identify pain points in the current way users interact with the service, and prioritize these according to user needs
- Design the digital parts of the service so that they are integrated with the offline touch points people use to interact with the service
- Develop metrics that will measure how well the service is meeting user needs at each step of the service

Key Questions

- What are the different ways (both online and offline) that people currently accomplish the task the digital service is designed to help with?
- Where are user pain points in the current way people accomplish the task?
- Where does this specific project fit into the larger way people currently obtain the service being offered?
- What metrics will best indicate how well the service is working for its users?

Play 3: Make it Simple and Intuitive

Using a government service shouldn't be stressful, confusing, or daunting. It's our job to build services that are simple and intuitive enough that users succeed the first time, unaided.

Checklist

- Use a simple and flexible design style guide for the service. Use the U.S. Web Design Standards as a default
- Use the design style guide consistently for related digital services
- Give users clear information about where they are in each step of the process
- Follow accessibility best practices to ensure all people can use the service
- Provide users with a way to exit and return later to complete the process
- Use language that is familiar to the user and easy to understand
- Use language and design consistently throughout the service, including online and offline touch points

Key Questions

- What primary tasks are the user trying to accomplish?
- Is the language as plain and universal as possible?
- What languages is your service offered in?
- If a user needs help while using the service, how do they go about getting it?
- How does the service's design visually relate to other government services?

Play 4: Build the Service Using Agile and Iterative Practices

We should use an incremental, fast-paced style of software development to reduce the risk of failure. We want to get working software into users' hands as early as possible to give the design and development team opportunities to adjust based on user feedback about the service. A critical capability is being able to automatically test and deploy the service so that new features can be added often and be put into production easily.

Checklist

- Ship a functioning "minimum viable product" (MVP) that solves a core user need as soon as possible, no longer than three months from the beginning of the project, using a "beta" or "test" period if needed
- Run usability tests frequently to see how well the service works and identify improvements that should be made
- Ensure the individuals building the service communicate closely using techniques such as launch meetings, war rooms, daily standups, and team chat tools
- Keep delivery teams small and focused; limit organizational layers that separate these teams from the business owners
- Release features and improvements multiple times each month

- Create a prioritized list of features and bugs, also known as the “feature backlog” and “bug backlog”
- Use a source code version control system
- Give the entire project team access to the issue tracker and version control system
- Use code reviews to ensure quality

Key Questions

- How long did it take to ship the MVP? If it hasn’t shipped yet, when will it?
- How long does it take for a production deployment?
- How many days or weeks are in each iteration/sprint?
- Which version control system is being used?
- How are bugs tracked and tickets issued? What tool is used?
- How is the feature backlog managed? What tool is used?
- How often do you review and reprioritize the feature and bug backlog?
- How do you collect user feedback during development? How is that feedback used to improve the service?
- At each stage of usability testing, which gaps were identified in addressing user needs?

Play 5: Structure Budgets and Contracts to Support Delivery

To improve our chances of success when contracting out development work, we need to work with experienced budgeting and contracting officers. In cases where we use third parties to help build a service, a well-defined contract can facilitate good development practices like conducting a research and prototyping phase, refining product requirements as the service is built, evaluating open source alternatives, ensuring frequent delivery milestones, and allowing the flexibility to purchase cloud computing resources.

The TechFAR Handbook provides a detailed explanation of the flexibilities in the Federal Acquisition Regulation (FAR) that can help agencies implement this play.

Checklist

- Budget includes research, discovery, and prototyping activities
- Contract is structured to request frequent deliverables, not multi-month milestones
- Contract is structured to hold vendors accountable to deliverables
- Contract gives the government delivery team enough flexibility to adjust feature prioritization and delivery schedule as the project evolves
- Contract ensures open source solutions are evaluated when technology choices are made
- Contract specifies that software and data generated by third parties remains under our control, and can be reused and released to the public as appropriate and in accordance with the law
- Contract allows us to use tools, services, and hosting from vendors with a variety of pricing models, including fixed fees and variable models like “pay-for-what-you-use” services
- Contract specifies a warranty period where defects uncovered by the public are addressed by the vendor at no additional cost to the government
- Contract includes a transition of services period and transition-out plan

Key Questions

- What is the scope of the project? What are the key deliverables?
- What are the milestones? How frequent are they?
- What are the performance metrics defined in the contract (e.g., response time, system uptime, time period to address priority issues)?

Play 6: Assign One Leader and Hold that Person Accountable

There must be a single product owner who has the authority and responsibility to assign tasks and work elements; make business, product, and technical decisions; and be accountable for the success or failure of the overall service. This product owner is ultimately responsible for how well the service meets needs of its users, which is how a service should be evaluated. The product owner is responsible for ensuring that features are built and managing the feature and bug backlogs.

Checklist

- A product owner has been identified
- All stakeholders agree that the product owner has the authority to assign tasks and make decisions about features and technical implementation details
- The product owner has a product management background with technical experience to assess alternatives and weigh tradeoffs
- The product owner has a work plan that includes budget estimates and identifies funding sources
- The product owner has a strong relationship with the contracting officer

Key Questions

- Who is the product owner?
- What organizational changes have been made to ensure the product owner has sufficient authority over and support for the project?
- What does it take for the product owner to add or remove a feature from the service?

Play 7: Bring in Experienced Teams

We need talented people working in government who have experience creating modern digital services. This includes bringing in seasoned product managers, engineers, and designers. When outside help is needed, our teams should work with contracting officers who understand how to evaluate third-party technical competency so our teams can be paired with contractors who are good at both building and delivering effective digital services. The makeup and experience requirements of the team will vary depending on the scope of the project.

Checklist

- Member(s) of the team have experience building popular, high-traffic digital services
- Member(s) of the team have experience designing mobile and web applications
- Member(s) of the team have experience using automated testing frameworks
- Member(s) of the team have experience with modern development and operations (DevOps) techniques like continuous integration and continuous deployment
- Member(s) of the team have experience securing digital services
- A Federal contracting officer is on the internal team if a third party will be used for development work
- A Federal budget officer is on the internal team or is a partner
- The appropriate privacy, civil liberties, and/or legal advisor for the department or agency is a partner

Play 8: Choose a Modern Technology Stack

The technology decisions we make need to enable development teams to work efficiently and enable services to scale easily and cost-effectively. Our choices for hosting infrastructure, databases, software frameworks, programming languages and the rest of the technology stack should seek to avoid vendor lock-in and match what successful modern consumer and enterprise software companies would choose today. In particular, digital services teams should consider using open source, cloud-based, and commodity solutions across the technology stack, because of their widespread adoption and support by successful consumer and enterprise technology companies in the private sector.

Checklist

- Choose software frameworks that are commonly used by private-sector companies creating similar services
- Whenever possible, ensure that software can be deployed on a variety of commodity hardware types
- Ensure that each project has clear, understandable instructions for setting up a local development environment, and that team members can be quickly added or removed from projects
- Consider open source software solutions at every layer of the stack

Key Questions

- What is your development stack and why did you choose it?
- Which databases are you using and why did you choose them?
- How long does it take for a new team member to start developing?

Play 9: Deploy in a Flexible Hosting Environment

Our services should be deployed on flexible infrastructure, where resources can be provisioned in real-time to meet spikes in traffic and user demand. Our digital services are crippled when we host them in data centers that market themselves as "cloud hosting" but require us to manage and maintain hardware directly. This outdated practice wastes time, weakens our disaster recovery plans, and results in significantly higher costs.

Checklist

- Resources are provisioned on demand
- Resources scale based on real-time user demand
- Resources are provisioned through an API
- Resources are available in multiple regions
- We only pay for resources we use
- Static assets are served through a content delivery network
- Application is hosted on commodity hardware

Key Questions

- Where is your service hosted?
- What hardware does your service use to run?
- What is the demand or usage pattern for your service?
- What happens to your service when it experiences a surge in traffic or load?
- How much capacity is available in your hosting environment?
- How long does it take you to provision a new resource, like an application server?
- How have you designed your service to scale based on demand?
- How are you paying for your hosting infrastructure (e.g., by the minute, hourly, daily, monthly, fixed)?
- Is your service hosted in multiple regions, availability zones, or data centers?
- In the event of a catastrophic disaster to a datacenter, how long will it take to have the service operational?
- What would be the impact of a prolonged downtime window?
- What data redundancy do you have built into the system, and what would be the impact of a catastrophic data loss?
- How often do you need to contact a person from your hosting provider to get resources or to fix an issue?

Play 10: Automate Testing and Deployments

Today, developers write automated scripts that can verify thousands of scenarios in minutes and then deploy updated code into production environments multiple times a day. They use automated performance tests which simulate surges in traffic to identify performance bottlenecks. While manual tests and quality assurance are still necessary, automated tests provide consistent and reliable protection against unintentional regressions, and make it possible for developers to confidently release frequent updates to the service.

Checklist

- Create automated tests that verify all user-facing functionality
- Create unit and integration tests to verify modules and components
- Run tests automatically as part of the build process
- Perform deployments automatically with deployment scripts, continuous delivery services, or similar techniques
- Conduct load and performance tests at regular intervals, including before public launch

Key Questions

- What percentage of the code base is covered by automated tests?
- How long does it take to build, test, and deploy a typical bug fix?
- How long does it take to build, test, and deploy a new feature into production?
- How frequently are builds created?
- What test tools are used?
- Which deployment automation or continuous integration tools are used?
- What is the estimated maximum number of concurrent users who will want to use the system?
- How many simultaneous users could the system handle, according to the most recent capacity test?
- How does the service perform when you exceed the expected target usage volume? Does it degrade gracefully or catastrophically?
- What is your scaling strategy when demand increases suddenly?

Play 11: Manage Security and Privacy through Reusable Processes

Our digital services have to protect sensitive information and keep systems secure. This is typically a process of continuous review and improvement which should be built into the development and maintenance of the service. At the start of designing a new service or feature, the team lead should engage the appropriate privacy, security, and legal officer(s) to discuss the type of information collected, how it should be secured, how long it is kept, and how it may be used and shared. The sustained engagement of a privacy specialist helps ensure that personal data is properly managed. In addition, a key process to building a secure service is comprehensively testing and certifying the components in each layer of the technology stack for security vulnerabilities, and then to re-use these same pre-certified components for multiple services.

The following checklist provides a starting point, but teams should work closely with their privacy specialist and security engineer to meet the needs of the specific service.

Checklist

- Contact the appropriate privacy or legal officer of the department or agency to determine whether a System of Records Notice (SORN), Privacy Impact Assessment, or other review should be conducted
- Determine, in consultation with a records officer, what data is collected and why, how it is used or shared, how it is stored and secured, and how long it is kept

- Determine, in consultation with a privacy specialist, whether and how users are notified about how personal information is collected and used, including whether a privacy policy is needed and where it should appear, and how users will be notified in the event of a security breach
- Consider whether the user should be able to access, delete, or remove their information from the service
- "Pre-certify" the hosting infrastructure used for the project using FedRAMP
- Use deployment scripts to ensure configuration of production environment remains consistent and controllable

Key Questions

- Does the service collect personal information from the user? How is the user notified of this collection?
- Does it collect more information than necessary? Could the data be used in ways an average user wouldn't expect?
- How does a user access, correct, delete, or remove personal information?
- Will any of the personal information stored in the system be shared with other services, people, or partners?
- How and how often is the service tested for security vulnerabilities?
- How can someone from the public report a security issue?

Play 12: Use Data to Drive Decisions

At every stage of a project, we should measure how well our service is working for our users. This includes measuring how well a system performs and how people are interacting with it in real-time. Our teams and agency leadership should carefully watch these metrics to find issues and identify which bug fixes and improvements should be prioritized. Along with monitoring tools, a feedback mechanism should be in place for people to report issues directly.

Checklist

- Monitor system-level resource utilization in real time
- Monitor system performance in real-time (e.g. response time, latency, throughput, and error rates)
- Ensure monitoring can measure median, 95th percentile, and 98th percentile performance
- Create automated alerts based on this monitoring
- Track concurrent users in real-time, and monitor user behaviors in the aggregate to determine how well the service meets user needs
- Publish metrics internally
- Publish metrics externally
- Use an experimentation tool that supports multivariate testing in production

Key Questions

- What are the key metrics for the service?
- How have these metrics performed over the life of the service?
- Which system monitoring tools are in place?
- What is the targeted average response time for your service? What percent of requests take more than 1 second, 2 seconds, 4 seconds, and 8 seconds?
- What is the average response time and percentile breakdown (percent of requests taking more than 1s, 2s, 4s, and 8s) for the top 10 transactions?
- What is the volume of each of your service's top 10 transactions? What is the percentage of transactions started vs. completed?

- What is your service's monthly uptime target?
- What is your service's monthly uptime percentage, including scheduled maintenance? Excluding scheduled maintenance?
- How does your team receive automated alerts when incidents occur?
- How does your team respond to incidents? What is your post-mortem process?
- Which tools are in place to measure user behavior?
- What tools or technologies are used for A/B testing?
- How do you measure customer satisfaction?

Play 13: Default to open

When we collaborate in the open and publish our data publicly, we can improve Government together. By building services more openly and publishing open data, we simplify the public's access to government services and information, allow the public to contribute easily, and enable reuse by entrepreneurs, nonprofits, other agencies, and the public.

Checklist

- Offer users a mechanism to report bugs and issues, and be responsive to these reports
- Provide datasets to the public, in their entirety, through bulk downloads and APIs (application programming interfaces)
- Ensure that data from the service is explicitly in the public domain, and that rights are waived globally via an international public domain dedication, such as the "Creative Commons Zero" waiver
- Catalog data in the agency's enterprise data inventory and add any public datasets to the agency's public data listing
- Ensure that we maintain the rights to all data developed by third parties in a manner that is releasable and reusable at no cost to the public
- Ensure that we maintain contractual rights to all custom software developed by third parties in a manner that is publishable and reusable at no cost
- When appropriate, create an API for third parties and internal users to interact with the service directly
- When appropriate, publish source code of projects or components online
- When appropriate, share your development process and progress publicly

Key Questions

- How are you collecting user feedback for bugs and issues?
- If there is an API, what capabilities does it provide? Who uses it? How is it documented?
- If the codebase has not been released under an open source license, explain why.
- What components are made available to the public as open source?
- What datasets are made available to the public?

Attachment 3: PQVP AD-DS Labor Categories and Descriptions

In satisfying Section D, PQVP AD-DS Participation and Submission Instructions, of RFI # CDT-PQVP-0118, Vendors must assemble a multidisciplinary and collaborative team to develop a Working Prototype that includes, at a minimum, five (5) of the fifteen (15) labor categories as identified in Section 1, PQVP AD-DS Labor Categories, below.

1. PQVP AD-DS Labor Categories

The labor categories that are within scope of the PQVP AD-DS and PQVP AD-DS 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	14. Full Stack Web Developer*
	15. Data Scientist*

* New classification established by CDT. It is not listed as a GSA 18F Agile Labor Category.

The PQVP AD-DS Labor Categories are primarily based on the GSA 18F Agile Labor Categories that are located at: https://pages.18f.gov/agile-labor-categories/.

2. PQVP AD-DS Labor Descriptions

Descriptions and responsibilities for each of the PQVP AD-DS Labor Categories are as follows:

1. Product Manager

Experience managing the delivery, ongoing success, and continuous improvement of one (1) or more digital products and/or platforms.

Primarily responsible for:

- Leading one (1) or more multi-disciplinary agile delivery teams to deliver excellent new products and/or iterations to existing products to meet user needs
- Gathering user requirements based on a communicable understanding of diverse audience groups
- Defining and obtaining stakeholder buy-in for product definition and delivery approach
- Creating effective, prioritized product descriptions, and delivery plans to meet user needs in a cost-effective way
- Interpreting user research in order to make the correct product decisions, noting that users do not always know what they want
- Continually keeping abreast of changes to user habits, preferences, and behaviors across various digital platforms and their implications for successful delivery of agile software development services

- Underpinning the delivery and iteration of agile software development services through effective analysis of qualitative and quantitative user data
- Credibly communicating 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
- Using version control systems, specifically GitHub
- Ensuring strategic alignment of technical design and architecture, including that of “big data,” 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)
- Collaborating and clearly communicating with stakeholders at every level
- May design data warehouses or reporting databases

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:

- Conducting stakeholder interviews, user requirements analysis, task analysis, conceptual modeling, information architecture, interaction design, and usability testing
- Designing and specifying user interfaces and information architecture

- Leading participatory- and iterative-design activities, including observational studies, customer interviews, usability testing, and other forms of requirements discovery
- Producing user requirements specifications and experience goals, personas, storyboards, scenarios, flowcharts, design prototypes, and design specifications
- Effectively communicating research findings, conceptual ideas, detailed design, and design rationale and goals both verbally and visually
- Planning and facilitating collaborative critiques and analysis & synthesis working sessions
- Working closely with visual designers and development teams to ensure that customer goals are met and design specifications are delivered upon
- Designing and developing primarily internet/web pages and applications
- Developing 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
- Researching 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:

- Improving content creation efforts by helping to lead the research & development of interactive and experiential storytelling for projects
- Advising how to improve the ongoing iteration of content models
- Collaborating with designers and other content strategists to improve how the effectiveness of digital, print, and other content is measured
- Developing and maintaining appropriate voice for produced content
- Advising how to streamline content production and management solutions and processes, based on user research
- Assigning, editing, and producing content for products, services, and various projects
- Planning and facilitating content strategy workshops and brainstorming sessions on developing content and content services (including API development)
- Collaborating closely with developers and designers to create, test, and deploy effective content marketing experiences using the Agile method of software development
- Offering educated recommendations on how to deliver a consistent, sustainable and standards-driven execution of content strategy across products, services, and projects
- Collaborating with content managers, writers, information architects, interaction designers, developers, and content creators of all types
- Participating, 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:

- Overseeing all visual design efforts
- Guiding, mentoring, and coaching team members while leading projects to successful completion
- Developing and maintaining relationships with key peers in Marketing, Branding, UX leaders, IT leaders, and others to identify and plan creative solutions
- Managing external service resources and budgets for visual design
- Ensuring successful completion of all work executed by the team (on time, on budget, and ensuring quality)
- Ensuring compliance with the project management methodologies and the Project Management Office processes and standards
- Developing, maintaining, and ensuring compliance of application release management, outage management and change control processes and standards
- Defining, creating, communicating, and managing 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)
- Using version control systems, specifically 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
- May design online report formats using analytics and business intelligence tools

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
- Using version control systems, specifically GitHub
- Quickly researching and learning new programming tools and techniques
- Using relational and non-relational database systems
- Using 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
- May design and build extract, transform, and load (ETL) subsystems

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 automate systems and infrastructure
- Installing and managing open source monitoring tools
- Configuring management tools (e.g., Puppet, Chef, Ansible, Salt)
- Collaborating with Project Management systems such as GitHub/GitLab/Stash/Accurev, JIRA, Pivotal Tracker, and Confluence
- Providing expertise in work relating to networking (e.g., load balancing and traffic management choices) as well as security (e.g., SSl termination, cert management)
- Using architecture for continuous integration and deployment, and continuous monitoring
- Using 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
- Developing and implementing technical solutions to help mitigate security vulnerabilities
- Conducting 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, helping agencies to establish the right processes for managing a portfolio of work in an agile way;

- At the organization level, driving 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, ensuring 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:

- Embedding an agile culture using techniques from a wide range or agile and lean methodologies and frameworks, but be methodology agnostic
- Helping to create an open and trust-based environment, which enables a focus on delivery and facilitates continuous improvement
- Assessing the culture of a team or organization and delivering processes in place to identify improvements and facilitate these improvements with the right type of support
- Showcasing relevant tools and techniques such as coaching, advising, workshops, and mentoring
- Engaging with stakeholders at all levels of the organization
- Developing clear lines of escalation, in agreement with senior managers
- Ensuring any stakeholder can easily find out an accurate and current project or program status, without disruption to delivery
- Working effectively with other suppliers and agencies
- Applying 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
- Ensuring key metrics and requirements that support the team and delivery of such are well defined and maintained
- Equipping 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:

- Supporting agencies by analyzing propositions and assessing decision-making factors such as strategic alignment, cost/benefit, and risk
- Working closely with the Product Manager to define a product approach to meet the specified user need
- Defining skill requirements and map internal, agency, and external (partners/specialist contractors) resources
- Working 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
- Analyzing and mapping the risks of this product approach and propose mitigation solutions

- Defining how the predicted user and financial benefit can be realized, and how channel shift will be measured
- Making recommendations 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:

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

14. Full Stack Web Developer

Experience using modern, full-cycle web application development to deploy end-to-end web-based systems, including all aspects of development, testing, and production launch.

Primarily responsible for:

- Web development using modern techniques, open-source programming languages (e.g., Ruby, Python) and frameworks (e.g., HTML5, CSS3, CSS frameworks like LESS and SASS, Responsive Design, Bourbon, Twitter Bootstrap, Django, Rails, Express)
- 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)
- Developing and consuming web-based RESTful APIs and client integrations
- Authoring developer-friendly documentation (e.g., API documentation, deployment operations)
- Test-driven development
- Using and working in team environments that use agile methodologies (e.g., Scrum, Lean)
- Using version control systems, specifically GitHub
- Using scalable search technology (e.g., ElasticSearch, Solr)
- Using and working with open source solutions and community
- Handling large data sets and scaling their handling and storage
- Quickly researching and learning new programming tools and techniques

- Communicating technical concepts to a non-technical audience

15. Data Scientist

Experience in leading edge digital services using deep analytics and machine learning to assist human decision-makers, while utilizing statistical and programming skills to collect, analyze, and interpret large data sets.

Primarily responsible for:

- Working with stakeholders to identify opportunities for leveraging data to drive business solutions
- Mining and analyzing data from data from various databases to drive optimization and improvement of product development, marketing techniques and business strategy
- Assessing the effectiveness and accuracy of new data sources and data gathering techniques
- Using statistical computer languages (e.g., R, Python, SQL)
- Using predictive modeling and deep learning tools (e.g., TensorFlow, Apache Spark, Apache MXNet)
- Using Git and UNIX/Linux command-line
- Using predictive modeling to increase and optimize customer experiences, revenue generation, and other business outcomes
- Processing, cleansing, and verifying the integrity of data used for analysis
- Developing custom data models and learning algorithms to apply to data sets
- Developing data-driven solutions to difficult business challenges
- Developing A/B testing framework and test model quality
- Developing processes and tools to monitor and analyze model performance and data accuracy
- Collaborating and working closely with cross-functional teams to identify gaps and structure problems, implement models, and monitor outcomes
- Collaborating with Project Management systems such as GitHub/GitLab/Stash/Accurev, JIRA, Pivotal Tracker, and Confluence
- Quickly learning and mastering new technologies and techniques
- Using and working with open source solutions and community
- Using and working in team environments that use agile methodologies (e.g., Scrum, Lean)
- Communicating technical concepts to a non-technical audience

Attachment 4: CMAS and IT MSA Information

1. PQVP AD-DS CMAS/IT MSA Requirements Overview

A CMAS and/or IT MSA contract is not required to participate in the PQVP AD-DS Screening Process. All Vendors selected for inclusion in the PQVP AD-DS will be required to have a valid CMAS contract using a GSA Federal Supply Schedule 70 base contract and/or an IT MSA within sixty (60) calendar days of being added to the PQVP AD-DS, unless an exemption from CDT has been obtained by the Vendor.

All Vendors must have a valid CMAS and/or IT MSA contract prior to responding to any PQVP AD-DS RFOs.

a. CMAS General Information

- General information related to the CMAS application process is available at: http://www.dgs.ca.gov/pd/Programs/Leveraged/CMAS.aspx.
- To access information about GSA Schedule 70 categories and descriptions, please visit the federal GSA eLibrary at: https://www.gsaelibrary.gsa.gov/.
- For general questions regarding the CMAS, please contact DGS at cmas@dgs.ca.gov or (916) 375-4363.

b. IT MSA General Information

The IT MSA is competitively bid by DGS, and is a type of agreement to establish a pre-qualified list of vendors and simplify the purchasing process for State Agencies/Departments. Vendors can only be added to the IT MSA when DGS conducts a refresh of the IT MSA.

- General information related to the IT MSA process is available at: http://www.dgs.ca.gov/pd/Programs/Leveraged/masteragreements.aspx
- For general questions about the IT MSA, please contact DGS at masters@dgs.ca.gov or (916) 375-4365.

2. CMAS and/or IT MSA Vendor Questions

Vendors may submit questions, via email, regarding the CMAS and/or IT MSA application process to the respective email address listed above in Section 1. Each inquiry must, at a minimum, include the following information:

a. "RFI # CDT-PQVP-0118, PQVP AD-DS CMAS Questions" or "RFI # CDT-PQVP-0118, PQVP AD-DS IT MSA Question(s)" in the subject line of the email;

b. Vendor name, contact name, contact phone number, and contact email address;

c. A description of the subject or issue in question; and

d. Carbon copy (cc) ADPQ@state.ca.gov.

Attachment 5: PQVP AD-DS RFO Information

1. Overview

After the PQVP AD-DS has been established, pre-approved State Agencies/Departments will develop and release PQVP AD-DS RFOs to the pre-qualified Vendors to deliver user-centric design and agile software development services. The pre-approval of State Agencies/Departments who can use the PQVP AD-DS lies solely with CDT.

As part of PQVP AD-DS RFO process, the Vendors selected to be included in the PQVP AD-DS will not be required to resubmit a Working Prototype or supporting (prototype) Technical Approach artifacts that were created as part of the PQVP AD-DS Screening Process.

2. PQVP AD-DS RFO Labor Categories

In developing the PQVP AD-DS RFOs, the State will include one (1) or more of the labor categories listed in Attachment B: PQVP AD-DS Labor Categories and Descriptions. While all the PQVP AD-DS 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
- 14. Full Stack Web Developer

3. PQVP AD-DS RFO Maintenance

Approved State Agencies/Departments will be responsible for managing the PQVP AD-DS RFO process. This includes, but is not limited to, the following:

- Contacting the Vendors in the PQVP AD-DS and providing them with specific RFO documentation (i.e., Business, Technical, Cost, Special Terms and Conditions);
- Assessing submitted PQVP AD-DS Vendor offers;
- Selecting and awarding to the winning PQVP AD-DS RFO Vendor;
- Contacting Vendors to inform them of their submission status, results, and providing debriefing, upon request; and
- Terminating Vendor contracts, if required.

4. Contract Execution Criteria

Approved State Agencies/Departments are 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 PQVP AD-DS 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 PQVP AD-DS Vendors.

Attachment A: PQVP AD-DS Administrative Requirements Checklist

To minimize the disqualification of RFI Response Submissions Packages due to administrative errors, CDT is providing Vendors the opportunity to submit common administrative documents during an optional Administrative Requirements Submission Open Window (ARSOW) period. The State will evaluate the Vendor's administrative documents during the ARSOW for accuracy and provide Vendors a response, in writing, giving Vendors the opportunity to correct any errors, prior to the final due date to submit Administrative Requirements. Vendors must submit all administrative documents to: ADPQ@state.ca.gov.

Complete this checklist to help confirm the items in your Response. Place a check mark or "X" next to each item that you are submitting to the California Department of Technology.

Administrative Requirement that must be submitted on or before RFI Response Submission Package due date:

☐	Attachment B	PQVP AD-DS Vendor Profile

Vendors selected to be included in the PQVP AD-DS must submit all Administrative Requirements to CDT within sixty (60) calendar days of the PQVP AD-DS Selection Announcement. Failure to submit the Administrative Requirements may cause a Vendor to be removed from PQVP AD-DS:

☐	Attachment C	Contractor Confidentiality Statement
☐	Attachment D	Payee Data Record (STD 204)
☐	Attachment E	Bidder Declaration (GSPD-05-105)
☐	Attachment F	California Secretary of State Certification
☐	Attachment G	California Seller's Permit (if applicable)
☐	Attachment H	Certificate(s) of Insurance
☐	Attachment I	Federal Debarment, Suspension, Ineligibility, and Voluntary Exclusion Certification
☐	Attachment J	Iran Contracting Act Certification
☐	Attachment K	California Civil Rights Laws Certification
☐	Attachment L	Irrevocable Offer Acknowledgement
☐	Attachment M	Substitution of Key Staff Acknowledgement
☐	Attachment N	Cloud Computing Special Provisions Acknowledgement
☐	Attachment O	CMAS General Provisions – Information Technology (GSPD-401IT-CMAS) Acknowledgement
☐	Attachment P	General Provisions – Information Technology (GSPD-401IT) Acknowledgement (for IT MSA)
☐	Attachment Q	CMAS-GSA/IT MSA Agreement *(All supplements and attachments, including job classification, experience requirements, education requirements, and hourly rates must be included in submission to CDT. Vendors must submit a separate Attachment Q for each respective Agreement)*
☐	Attachment R	PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing *(Vendors must submit a separate Attachment R for each respective Agreement)*

Attachment B: PQVP AD-DS Vendor Profile

Vendor/Firm Name	Vendor/Firm Address
Parent Corporation and/or Subsidiaries (if applicable)	
Vendor/Firm Certification Status (if applicable) California Certified Small or Micro Business ☐ California Certified DVBE ☐	
Brief Company Overview*	
Primary Contact Name and Title	Secondary Contact Name and Title
Primary Contact Address	Secondary Contact Address
Primary Contact Phone Number	Secondary Contact Phone Number
Primary Contact Email	Secondary Contact Email
Vendor/Firm GitHub Repository URL**	

** Provide a Brief Company Overview, including number of years in business, number of employees, nature of business, and description of clients. If additional space is need, another sheet of paper may be attached.*

*** If more than one (1) branch is present, then note the specific branch that should be reviewed.*

Attachment C: Contractor Confidentiality Statement

As an authorized representative or corporate officer of the company named below, I have the authority to bind the company contractually, and I agree that all persons employed by this company will adhere to the following policy:

All information belonging to the Department of Technology or its affiliated agencies is considered sensitive and confidential and cannot be disclosed to any person or entity that is not directly approved to participate in the work required to execute this Agreement.

I certify that I will keep all project information including (but not limited to) information concerning the planning, processes, development or procedures of the project, and all communication with Department of Technology or its affiliates related to any procurement process, confidential and secure. I will not copy, give or otherwise disclose such information to any other person unless the Department of Technology has on file a Confidentiality Statement signed by the other person(s), and the disclosure is authorized and necessary for the project. I understand that the information to be kept confidential includes, but is not limited to, specifications, administrative requirements, terms and conditions, concepts and discussions, as well as written and electronic materials. I further understand that if I leave this project before it ends, I must still keep all project information confidential. I agree to follow any instructions provided by the project relating to the confidentiality of project information.

I fully understand that any unauthorized disclosure I make may be basis for civil and/or criminal penalties. I agree to advise the Contract Manager immediately in the event of an unauthorized disclosure, inappropriate access, misuse, theft or loss of data.

I warrant that if my company is awarded the Contract, it will not enter into any agreements or discussions with a third party concerning such materials prior to receiving written confirmation from the State that such third party has an agreement with the State similar in nature to this one.

All materials provided for this Project, except where explicitly stated will be promptly returned or destroyed, as instructed by an authorized Department of Technology representative. If the materials are destroyed and not returned, a letter attesting to their complete destruction, which documents the destruction procedures, must be sent to the Contract Manager before payment can be made for services rendered. In addition, all copies or derivations, including any working or archival backups of the information, will be physically and/or electronically destroyed within five (5) calendar days immediately following either the end of the Contract period or the final payment, as determined by the contracting Agency/state entity.

All personnel assigned to this project shall be provided a Confidentiality Statement and will be expected to sign and return it to the State's project manager before beginning work on this project.

Representative Name and Title	
Company Name	
Address	
Phone Number	Email
Signature	Date

Attachment D: Payee Data Record (STD 204)

ATTACH THE VENDOR'S PAYEE DATA RECORD (STD. 204) AS ATTACHMENT D.

Refer to the following website link to obtain the appropriate form and information for the *Payee Data Record (STD 204)*: http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf.

Attachment E: Bidder Declaration (GSPD-05-105)

ATTACH THE BIDDER DECLARATION GSPD-05-105 AS ATTACHMENT E.

The *Bidder Declaration GSPD-05-105* and its instructions are available as a fill and print PDF at: http://www.documents.dgs.ca.gov/pd/poliproc/Master-Biddeclar08-09.pdf

Attachment F: California Secretary of State Certification

ATTACH A COPY OF THE VENDOR'S SECRETARY OF STATE CERTIFICATION STATUS AS ATTACHMENT F.

For more information on certification/status of registration, refer to the following website link: http://kepler.sos.ca.gov/

Attachment G: California Seller's Permit (if applicable)

ATTACH A COPY OF THE VENDOR'S CALIFORNIA SELLER'S PERMIT AS ATTACHMENT G.

For more information on a seller's permit or certification of registration, refer to the following links:

http://boe.ca.gov/

http://boe.ca.gov/pdf/pub73.pdf

Attachment H: Certificate(s) of Insurance

ATTACH A COPY OF THE VENDOR'S CERTIFICATE(S) OF INSURANCE AS ATTACHMENT H.

The Vendor must submit Attachment H: Certificate(s) of Insurance, showing evidence of coverage(s). The Certificate(s) of Insurance (COI) does/do not need to name the State as an additional insured at the time of submission to CDT. However, if a Vendor is awarded a contract from a PQVP AD-DS RFO, the Vendor will be required to submit the COI with the State named as additional insured within ten (10) calendar days of contract award.

Attachment I: Federal Debarment, Suspension, Ineligibility, and Voluntary Exclusion Certification

The agency must have this form completed by the Contractor when federal funds are used.

1. Federal Requirement

Contracts are required to provide the following certification to the Agency before award of a purchase order using federal funds. This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, Participants; responsibilities. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 19160-19211).

2. Present Status

The prospective recipient of federal assistance funds certified, by submission of this signed certification, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in future PQVP AD-DS transactions by any federal department or agency.

3. Attach Explanation

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this certification.

4. Instructions for Certification

BEFORE COMPLETEING CERTIFICATION, READ THE FOLLOWING INSTRUCTIONS THAT ARE AN INTEGRA. PART OF THE CERTIFICATION.

a. By signing and submitting this certification, the prospective recipient of federal assistance funds is providing the certification as set out below.
b. The certification in this class is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective recipient of federal assistance funds knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the Department of Labor (DOL) may pursue available remedies, including suspension and/or debarment.
c. The prospective recipient of federal assistance funds shall provide immediate written notice to the person to whom this certification is submitted if at any time the prospective recipient of federal assistance funds learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
d. The terms “covered transaction,” “debarred,” “suspended,” “ineligible,” “lower tier covered transaction,” “participant,” “person,” “primary covered transaction,” “principle,” “proposal,” and “voluntary exclude,” as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549.
e. The prospective recipient of federal assistance funds agrees by submitting this certification that, should the proposed covered transaction be entered into, it shall not, knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the DOL.
f. The prospective recipient of federal assistance funds further agrees by submitting this certification that it will include the clause titled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion – Lower Tier Covered Transactions,”

without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.

g. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded from Procurement and Non-Procurement Programs.
h. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
i. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the DOL may pursue available remedies, including suspension and/or debarment.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment J: Iran Contracting Act of 2010 Certification

IRAN CONTRACTING ACT (Public Contract Code § 2202-2208)

Prior to bidding on, submitting a proposal or executing a Contract or renewal for a State of California Contract for goods or services of $1,000,000 or more, a Vendor must either: a) certify it is **not** on the current list of persons engaged in investment activities in Iran created by the California Department of General Services ("DGS") pursuant to Public Contract Code § 2203(b) and is not a financial institution extending twenty million dollars ($20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS; or b) demonstrate it has been exempted from the certification requirement for that solicitation or Contract pursuant to Public Contract Code § 2203(c) or (d).

To comply with this requirement, please insert your Vendor or financial institution name and Federal ID Number (if available) and complete **one** of the options below. Please note: California law (Public Contract Code § 2205) establishes penalties for providing false certifications, including civil penalties equal to the greater of $250,000 or twice the amount of the Contract for which the false certification was made; Contract termination; and three-year ineligibility to bid on Contracts.

OPTION #1 - CERTIFICATION

I, the official named below, certify I am duly authorized to execute this certification on behalf of the Vendor/financial institution identified below, and the Vendor/financial institution identified below is **not** on the current list of persons engaged in investment activities in Iran created by DGS and is not a financial institution extending twenty million dollars ($20,000,000) or more in credit to another person/Vendor, for 45 days or more, if that other person/Vendor will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS.

Vendor Name/Financial Institution (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment J: Iran Contracting Act of 2010 Certification, continued.

OPTION #2 – EXEMPTION

Pursuant to Public Contract Code Sections 2203(c) and (d), a public entity may permit a Vendor/financial institution engaged in investment activities in Iran, on a case-by-case basis, to be eligible for, or to bid on, submit a proposal for, or enter into or renew a contract for goods and services.

If you have obtained an exemption from the certification requirement under the Iran Contracting Act, please fill out the information below, and attach documentation demonstrating the exemption approval.

<table>
<tr><td colspan="2">Vendor Name/Financial Institution (Printed)</td><td>Federal ID Number</td></tr>
<tr><td colspan="3">By (Authorized Signature)</td></tr>
<tr><td colspan="3">Printed Name and Title of Person Signing</td></tr>
<tr><td>Date Executed</td><td colspan="2">Executed in</td></tr>
</table>

Attachment K: California Civil Rights Laws Certification

Pursuant to Public Contract Code Section 2010, if a bidder or proposer executes or renews a contract over $100,000 on or after January 1, 2017, the bidder or proposer hereby certifies compliance with the following:

1. CALIFORNIA CIVIL RIGHTS LAWS: For contracts over $100,000 executed or renewed after January 1, 2017, the contractor certifies compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code) and the Fair Employment and Housing Act (Section 12960 of the Government Code); and

2. EMPLOYER DISCRIMINATORY POLICIES: For contracts over $100,000 executed or renewed after January 1, 2017, if a Contractor has an internal policy against a sovereign nation or peoples recognized by the United States government, the Contractor certifies that such policies are not used in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the Fair Employment and Housing Act (Section 12960 of the Government Code).

CERTIFICATION

I, the official named below, certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment L: Irrevocable Offer Acknowledgement

A Vendor's final offer in response to a PQVP AD-DS RFO shall constitute a firm offer, which shall remain irrevocable for not less than ninety (90) calendar days following the date of contract award specified in the PQVP AD-DS RFO. In the event of a delay in contract award, a Vendor may extend the expiration date of its firm offer an additional thirty (30) calendar days by written notice to the State.

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-related reviews. The State's execution of a contract under a PQVP AD-DS 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 PQVP AD-DS RFO solicitation, to accept any other Vendor's firm offer and form a contract with the other Vendor. The State may continue to terminate and contract with any other Vendors, as described above, until the expiration of all acceptable and firm offers obtained from the original PQVP AD-DS RFO.

By signing and submitting this Attachment L: Irrevocable Offer Acknowledgement, I, the official named below, acknowledge and agree to the Irrevocable Offer requirements for contracts awarded from PQVP AD-DS RFOs.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment M: Substitution of Key Staff Acknowledgement

Unless otherwise stated in the contract awarded from a PQVP AD-DS RFO, the Vendor shall obtain prior approval, in writing, from the State before attempting to change the Key Staff proposed in their response to subsequent PQVP AD-DS RFOs. This includes substitutions made between submission of the final offer and the actual start date of Project, as well as staffing changes during the course of the contact term. If a member of Vendor's Key Staff is unable to perform due to factors beyond Vendor's reasonable control (e.g., illness, resignation), the Vendor shall use its best efforts to promptly provide a suitable substitute. In the event replacement of Key Staff is required, the Vendor shall provide a replacement candidate that meets or exceeds the requirements of the PQVP AD-DS RFO and allow the State the opportunity to interview and approve the candidate. If the State rejects a proposed replacement staff member and a qualified replacement is not provided to the State for approval, the Vendor shall be in material breach of the contract, unless the State provides an extension in writing. The State will not unreasonably delay or deny acceptance of Vendor's proposed candidate. The candidate receiving acceptance by the State shall be available to start immediately, unless otherwise agreed to by the State.

By signing and submitting this Attachment M: Substitution of Key Staff Acknowledgement, I, the official named below, acknowledge and agree to the Substitution of Key Staff requirements for contracts awarded from PQVP AD-DS RFOs.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment N: Cloud Computing Special Provisions Acknowledgement

For a complete copy of the State's Cloud Computing Special Provisions, refer to the following links:

Special Provisions for Software as a Service (SaaS):

http://www.documents.dgs.ca.gov/pd/poliproc/CLOUDCOMPUTINGSERVICESSPECIALPROVISIONS_14_0903.docx

Special Provisions for Infrastructure as a Service (IaaS) and Platform as a Service (PaaS):

https://www.documents.dgs.ca.gov/pd/poliproc/CLOUDCOMPUTINGSPECIALPROVISIONS_Infrastructure%20as%20a%20Service%20and%20Platform%20as%20a%20Service.pdf

By signing and submitting this Attachment N: Cloud Computing Special Provisions, I, the official named below, acknowledge and agree to the State of California's Special Provisions for SaaS, IaaS, and PaaS in relation to the RFI # CDT-PQVP-0118 and contracts awarded from PQVP AD-DS RFOs.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment O: CMAS General Provisions – Information Technology (GSPD-401IT-CMAS) Acknowledgement

For a complete copy of the State's *CMAS General Provisions – Information Technology (GSPD-401IT-CMAS)*, refer to the following link:

https://www.documents.dgs.ca.gov/PD/CMAS/MASTCIT9-8-14.PDF

By signing and submitting this Attachment O: CMAS General Provisions – Information Technology (GSPD-401IT-CMAS), I, the official named below, have read, acknowledge, and agree with the terms and conditions located at the link provided above.

<table>
<tr><td colspan="2">Vendor Firm Name (Printed)</td><td>Federal ID Number</td></tr>
<tr><td colspan="3">By (Authorized Signature)</td></tr>
<tr><td colspan="3">Printed Name and Title of Person Signing</td></tr>
<tr><td>Date Executed</td><td colspan="2">Executed in</td></tr>
</table>

Attachment P: General Provisions – Information Technology (GSPD-401IT) Acknowledgement

For a complete copy of the State's *General Provisions – Information Technology (GSPD-401IT)*, refer to the following link:

https://www.documents.dgs.ca.gov/pd/poliproc/GSPD401IT14_0905.pdf

By signing and submitting this Attachment P: General Provisions – Information Technology (GSPD-401IT), I, the official named below, have read, acknowledge, and agree with the terms and conditions located at the link provided above.

Vendor Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	
Date Executed	Executed in

Attachment Q: Vendor CMAS-GSA/IT MSA Agreement

ATTACH A COPY OF THE VENDOR'S CMAS CONTRACT AND SUPPORTING FEDERAL GSA AGREEMENT AND/OR IT MSA AS ATTACHMENT Q.

All Vendors who have been selected to be included in the PQVP AD-DS must submit a copy of their fully executed CMAS contract and supporting GSA contract/documentation and/or IT MSA Agreement to the State within sixty (60) calendar days of the PQVP AD-DS Selection Announcement (see Section A.1 PQVP AD-DS Key Action Dates of the RFI). Vendors must submit a separate Attachment Q for each respective Agreement. Attachment Q must be sent to ADPQ@state.ca.gov.

Attachment R: PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing

All Vendors who are selected to be included in the PQVP AD-DS must submit Attachment R: PQVP AD-DS/CMAS/IT MSA Classification Mapping and Pricing to the State within sixty (60) calendar days of the PQVP AD-DS Selection Announcement (see Section A.1 PQVP AD-DS Key Action Dates). Vendors must submit a separate Attachment R for each respective Agreement. Attachment R must be sent to ADPQ@state.ca.gov.

CMAS/IT MSA CLASSIFICATION	MAXIMUM HOURLY RATE PROPOSED IN CMAS/IT MSA	PQVP AD-DS LABOR CATEGORIES														
		1. Product Manager	2. Technical Architect	3. Interaction Designer/Researcher/Usability Tester	4. Writer/Content Designer/Content Strategist	5. Visual Designer	6. Front End Developer	7. Backend Developer	8. DevOps Engineer	9. Security Engineer	10. Delivery Manager	11. Agile Coach	12. Business Analyst	13. Digital Performance Analyst	14. Full Stack Developer	15. Data Scientist